



MISSOURI
Career Center
Where talent and opportunities meet

Toolbox 2.0 Desk Aid Complement—CAP

Alerts

Question: *Updated 6/11/8*

Why do we need to check the alerts on the 'Seeker History' screen?

Answer:

Currently, Toolbox 2.0 is not stable enough to assume the alert went through without checking this screen. In addition, there are no edit checks and if all of the required information is not entered, the alert will not be sent.

The 'Seeker History Screen' shows multiple items, including previous alerts that were sent:

Seeker Histories - CHRISTINA MAR HAVERLAND(###-##-4269) | JACKIE WEAVER (660)885-5110

Seeker Services | Change History | Notes | Payments | FSD Load Information | Exit Snapshot

Display Options

- ☒ Service History
- ☒ Correspondence
- ☒ Workshop Notices
- ☒ Tasks
- ☒ Appointments
- ☒ WSL Referrals
- ☒ Alerts
- ☒ Enrollments

Counts

- DWD Referrals: 5
- Self Referrals: 8
- Employer Referrals: 0
- Placements: 0
- Services: 21
- Scratch Pads: 0

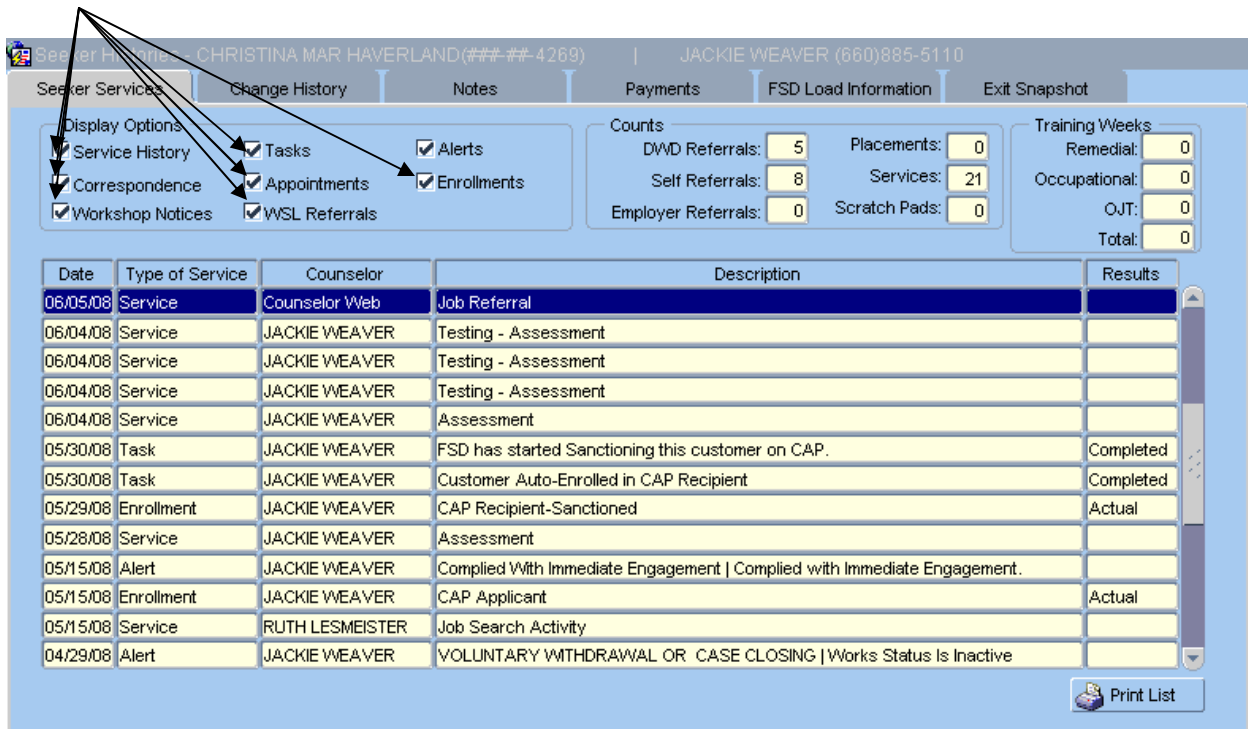
Training Weeks

- Remedial: 0
- Occupational: 0
- OJT: 0
- Total: 0

Date	Type of Service	Counselor	Description	Results
06/05/08	Service	Counselor Web	Job Referral	
06/04/08	Service	JACKIE WEAVER	Testing - Assessment	
06/04/08	Service	JACKIE WEAVER	Testing - Assessment	
06/04/08	Service	JACKIE WEAVER	Testing - Assessment	
06/04/08	Service	JACKIE WEAVER	Assessment	
05/30/08	Task	JACKIE WEAVER	FSD has started Sanctioning this customer on CAP.	Completed
05/30/08	Task	JACKIE WEAVER	Customer Auto-Enrolled in CAP Recipient	Completed
05/29/08	Enrollment	JACKIE WEAVER	CAP Recipient-Sanctioned	Actual
05/28/08	Service	JACKIE WEAVER	Assessment	
05/15/08	Alert	JACKIE WEAVER	Complied With Immediate Engagement Complied with Immediate Engagement.	
05/15/08	Enrollment	JACKIE WEAVER	CAP Applicant	Actual
05/15/08	Service	RUTH LESMEISTER	Job Search Activity	
04/29/08	Alert	JACKIE WEAVER	VOLUNTARY WITHDRAWAL OR CASE CLOSING Works Status Is Inactive	

Print List

If you would like to look at only alerts, you can “uncheck” all of the other boxes.



Date	Type of Service	Counselor	Description	Results
06/05/08	Service	Counselor Web	Job Referral	
06/04/08	Service	JACKIE WEAVER	Testing - Assessment	
06/04/08	Service	JACKIE WEAVER	Testing - Assessment	
06/04/08	Service	JACKIE WEAVER	Testing - Assessment	
06/04/08	Service	JACKIE WEAVER	Assessment	
05/30/08	Task	JACKIE WEAVER	FSD has started Sanctioning this customer on CAP.	Completed
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05/15/08	Service	RUTH LESMEISTER	Job Search Activity	
04/29/08	Alert	JACKIE WEAVER	VOLUNTARY WITHDRAWAL OR CASE CLOSING Works Status Is Inactive	

Question: *Added 6/3/8*

Why did Toolbox 2.0 allow you to send an inappropriate alert (i.e. alert “teen parent in an educational activity” for someone who was not a teen parent)?

Answer:

Immediately after conversion, there were no edit checks on alerts. This has since been resolved.

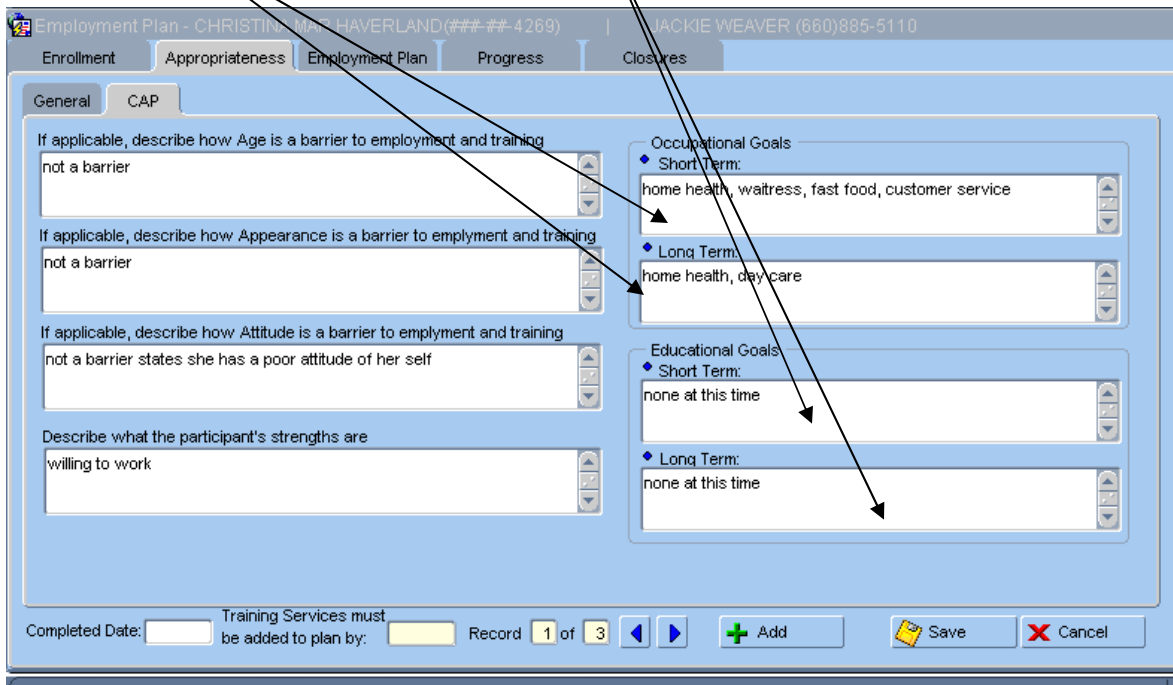
Question: *Updated 6/11/8*

What steps are required to ensure the IE compliance alert is sent from Toolbox 2.0 to FAMIS?

Answer:

After all four of the boxes on the right side of the ‘CAP Appropriateness’ tab are completed, the alert should send in the overnight batch. The case manager will need to verify the alert is showing on the ‘Seeker History Screen’.

The 'Occupational Goals' and 'Educational Goals' must be completed for the IE alert to generate:



Employment Plan - CHRISTINA MAR HAVERLAND(### ## 4269) | JACKIE WEAVER (660)885-5110

Enrollment | Appropriateness | **Employment Plan** | Progress | Closures

General | CAP

If applicable, describe how Age is a barrier to employment and training
not a barrier

If applicable, describe how Appearance is a barrier to employment and training
not a barrier

If applicable, describe how Attitude is a barrier to employment and training
not a barrier states she has a poor attitude of her self

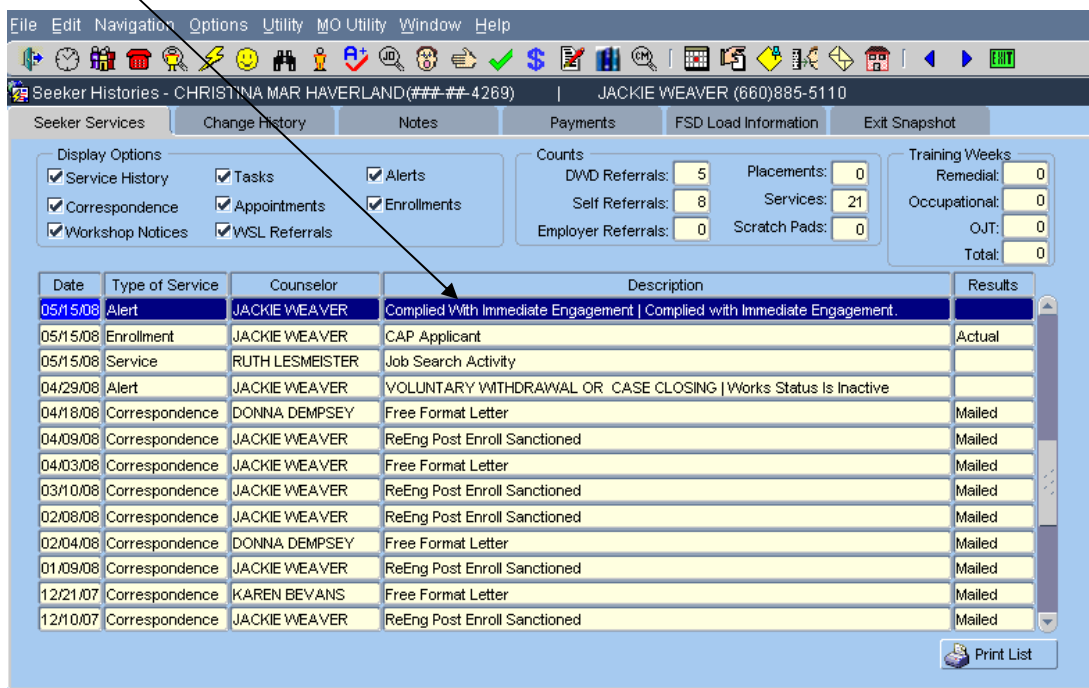
Describe what the participant's strengths are
willing to work

Occupational Goals
♦ Short Term:
home health, waitress, fast food, customer service
♦ Long Term:
home health, day care

Educational Goals
♦ Short Term:
none at this time
♦ Long Term:
none at this time

Completed Date: Training Services must be added to plan by: Record 1 of 3 + Add Save Cancel

On the 'Seeker History' screen under the 'Seeker Services' tab, 'Complied with Immediate Engagement' will write after the 'CAP Appropriateness' tab is completed and saved.



File Edit Navigation Options Utility MO Utility Window Help

Seeker Histories - CHRISTINA MAR HAVERLAND(### ## 4269) | JACKIE WEAVER (660)885-5110

Seeker Services | Change History | Notes | Payments | FSD Load Information | Exit Snapshot

Display Options
☒ Service History ☒ Tasks ☒ Alerts
☒ Correspondence ☒ Appointments ☒ Enrollments
☒ Workshop Notices ☒ WSL Referrals

Counts
 DWD Referrals: 5 Placements: 0
 Self Referrals: 8 Services: 21
 Employer Referrals: 0 Scratch Pads: 0

Training Weeks
 Remedial: 0
 Occupational: 0
 OJT: 0
 Total: 0

Date	Type of Service	Counselor	Description	Results
05/15/08	Alert	JACKIE WEAVER	Complied With Immediate Engagement Complied with Immediate Engagement.	
05/15/08	Enrollment	JACKIE WEAVER	CAP Applicant	Actual
05/15/08	Service	RUTH LESMEISTER	Job Search Activity	
04/29/08	Alert	JACKIE WEAVER	VOLUNTARY WITHDRAWAL OR CASE CLOSING Works Status Is Inactive	
04/18/08	Correspondence	DONNA DEMPSEY	Free Format Letter	Mailed
04/09/08	Correspondence	JACKIE WEAVER	ReEng Post Enroll Sanctioned	Mailed
04/03/08	Correspondence	JACKIE WEAVER	Free Format Letter	Mailed
03/10/08	Correspondence	JACKIE WEAVER	ReEng Post Enroll Sanctioned	Mailed
02/08/08	Correspondence	JACKIE WEAVER	ReEng Post Enroll Sanctioned	Mailed
02/04/08	Correspondence	DONNA DEMPSEY	Free Format Letter	Mailed
01/09/08	Correspondence	JACKIE WEAVER	ReEng Post Enroll Sanctioned	Mailed
12/21/07	Correspondence	KAREN BEVANS	Free Format Letter	Mailed
12/10/07	Correspondence	JACKIE WEAVER	ReEng Post Enroll Sanctioned	Mailed

Print List

Question: *Added 6/11/8*

What if FSD did not receive a sanction alert?

Answer:

This was a programming error. The sanction process will have to be restarted. The case manager will have to use the free-form format to re-send the conciliation and sanction letters as currently, the programmers took away the ability to re-send the letter from the Seeker Correspondence.

Question: *Added 11/10/8*

Why won't Toolbox 2.0 allow me to delete alerts after the day it was sent?

Answer:

Toolbox 2.0 was allowing this in error. The Alerts policy has not changed and alert deletion is only allowed the same day the alert was entered in Toolbox 2.0 since the alert is sent to FSD in the overnight batch.

Local FSD should be contacted if any alerts was sent in error and not deleted the same day. In addition, case notes should be written.

Assessment

Question:

What information will populate from Missouri Career Source to the Assessment?

Answer:

Generally, most items that are redundant will populate on the assessment. This includes: seeker's basic information, work history, education/certification, and skills/tools. It is important to review any information that has automatically been populated to the assessment with the client.

Assigning Counselors

Question: *Added 6/3/8*

We were not able to change the primary counselor during the applicant phase; however, the counselor is in the same region, will this affect the file?

Answer:

This won't affect anything for IE compliance. Please change the counselor during the recipient phase.

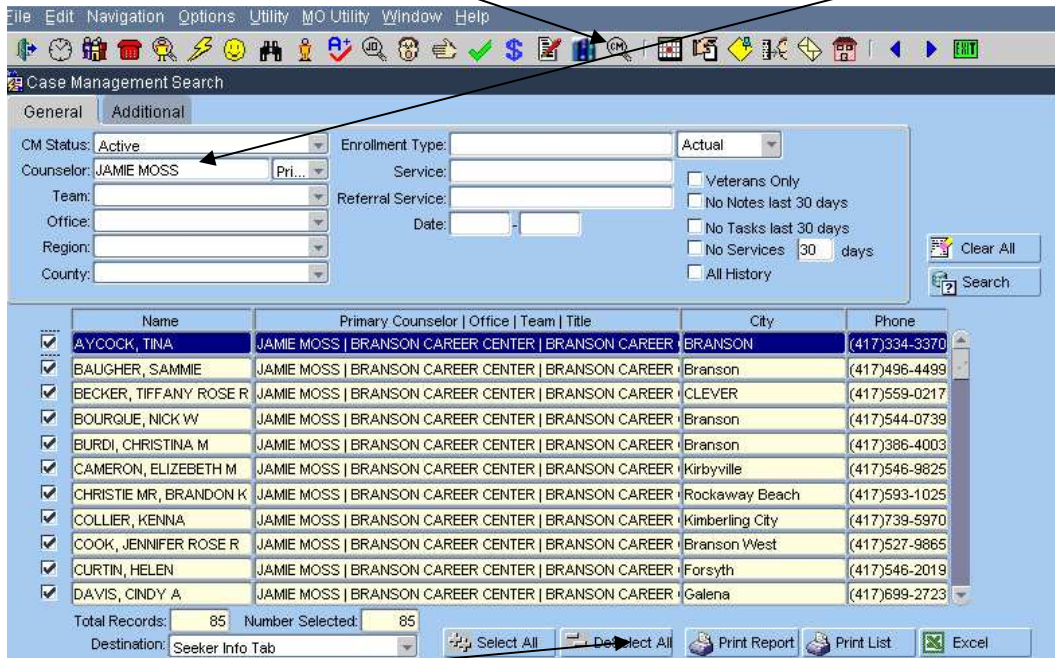
Question: *Added 6/11/8*

How is a client transferred to a new case manager within the same region?

Answer:

Transfers will be handled by your local individual who has the "Reassign" privilege. To complete the transfer:

1. Do a 'Case Management' search for the counselor that is currently "assigned" to the client's case.

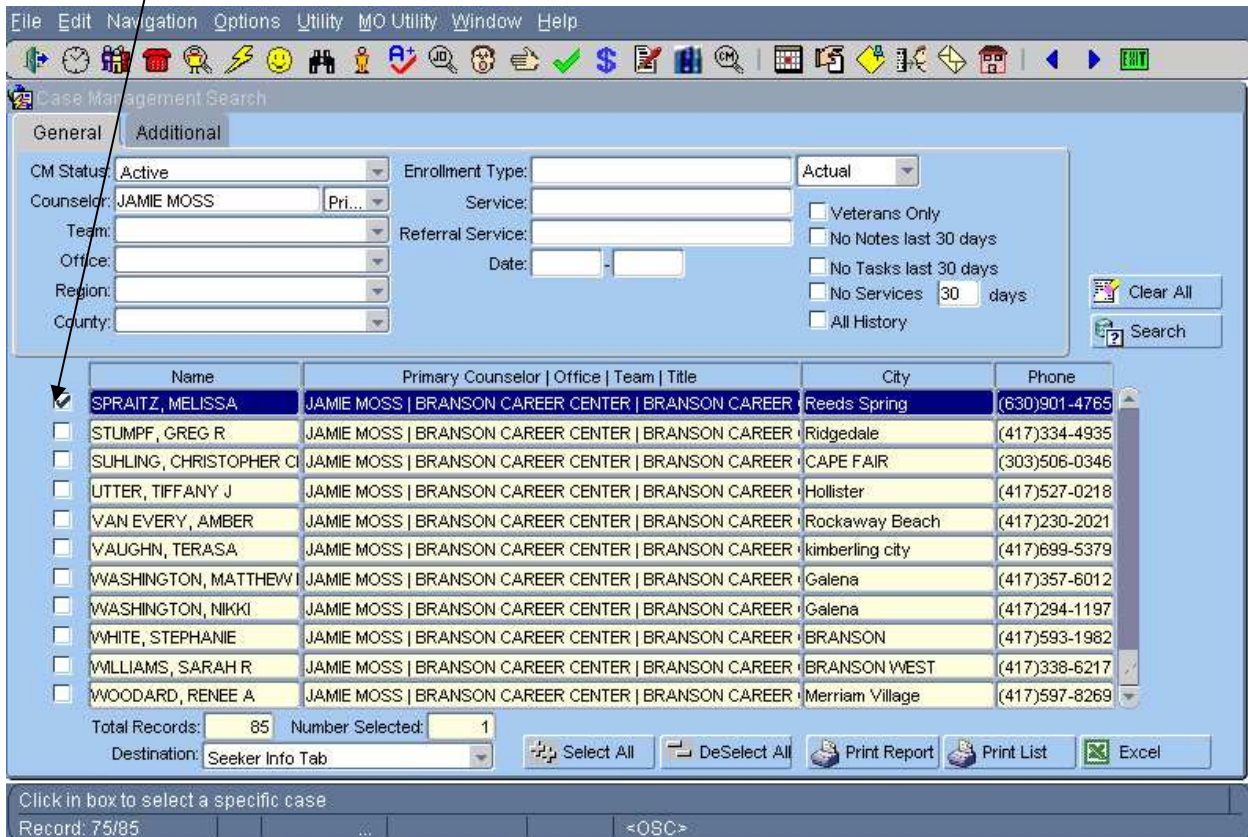


	Name	Primary Counselor Office Team Title	City	Phone
<input checked="" type="checkbox"/>	AYCOCK, TINA	JAMIE MOSS BRANSON CAREER CENTER BRANSON CAREER	BRANSON	(417)334-3370
<input checked="" type="checkbox"/>	BAUGHER, SAMMIE	JAMIE MOSS BRANSON CAREER CENTER BRANSON CAREER	Branson	(417)496-4499
<input checked="" type="checkbox"/>	BECKER, TIFFANY ROSE R	JAMIE MOSS BRANSON CAREER CENTER BRANSON CAREER	CLEVER	(417)559-0217
<input checked="" type="checkbox"/>	BOURQUE, NICK W	JAMIE MOSS BRANSON CAREER CENTER BRANSON CAREER	Branson	(417)544-0739
<input checked="" type="checkbox"/>	BURDI, CHRISTINA M	JAMIE MOSS BRANSON CAREER CENTER BRANSON CAREER	Branson	(417)386-4003
<input checked="" type="checkbox"/>	CAMERON, ELIZABETH M	JAMIE MOSS BRANSON CAREER CENTER BRANSON CAREER	Kirbyville	(417)546-9825
<input checked="" type="checkbox"/>	CHRISTIE MR, BRANDON K	JAMIE MOSS BRANSON CAREER CENTER BRANSON CAREER	Rockaway Beach	(417)593-1025
<input checked="" type="checkbox"/>	COLLIER, KENNA	JAMIE MOSS BRANSON CAREER CENTER BRANSON CAREER	Kimberling City	(417)739-5970
<input checked="" type="checkbox"/>	COOK, JENNIFER ROSE R	JAMIE MOSS BRANSON CAREER CENTER BRANSON CAREER	Branson West	(417)527-9865
<input checked="" type="checkbox"/>	CURTIN, HELEN	JAMIE MOSS BRANSON CAREER CENTER BRANSON CAREER	Forsyth	(417)546-2019
<input checked="" type="checkbox"/>	DAVIS, CINDY A	JAMIE MOSS BRANSON CAREER CENTER BRANSON CAREER	Galena	(417)699-2723

Total Records: 85 Number Selected: 85
Destination: Seeker Info Tab
Select All Deselect All Print Report Print List Excel

2. 'Deselect' all of the cases from the screen.

3. Select the client that needs the case transferred.



File Edit Navigation Options Utility MO Utility Window Help

Case Management Search

General Additional

CM Status: Active Enrollment Type: Actual

Counselor: JAMIE MOSS Pri... Service:

Team: Referral Service:

Office: Date: -

Region:

County:

☐ Veterans Only
☐ No Notes last 30 days
☐ No Tasks last 30 days
☐ No Services 30 days
☐ All History

Clear All Search

Name	Primary Counselor Office Team Title	City	Phone
<input checked="" type="checkbox"/> SPRAITZ, MELISSA	JAMIE MOSS BRANSON CAREER CENTER BRANSON CAREER	Reeds Spring	(630)901-4765
<input type="checkbox"/> STUMPF, GREG R	JAMIE MOSS BRANSON CAREER CENTER BRANSON CAREER	Ridgedale	(417)334-4935
<input type="checkbox"/> SUHLING, CHRISTOPHER C	JAMIE MOSS BRANSON CAREER CENTER BRANSON CAREER	CAPE FAIR	(303)506-0346
<input type="checkbox"/> UTTER, TIFFANY J	JAMIE MOSS BRANSON CAREER CENTER BRANSON CAREER	Hollister	(417)527-0218
<input type="checkbox"/> VAN EVERY, AMBER	JAMIE MOSS BRANSON CAREER CENTER BRANSON CAREER	Rockaway Beach	(417)230-2021
<input type="checkbox"/> VAUGHN, TERESA	JAMIE MOSS BRANSON CAREER CENTER BRANSON CAREER	kimberling city	(417)699-5379
<input type="checkbox"/> WASHINGTON, MATTHEW	JAMIE MOSS BRANSON CAREER CENTER BRANSON CAREER	Galena	(417)357-6012
<input type="checkbox"/> WASHINGTON, NIKKI	JAMIE MOSS BRANSON CAREER CENTER BRANSON CAREER	Galena	(417)294-1197
<input type="checkbox"/> WHITE, STEPHANIE	JAMIE MOSS BRANSON CAREER CENTER BRANSON CAREER	BRANSON	(417)593-1982
<input type="checkbox"/> WILLIAMS, SARAH R	JAMIE MOSS BRANSON CAREER CENTER BRANSON CAREER	BRANSON WEST	(417)338-6217
<input type="checkbox"/> WOODARD, RENEE A	JAMIE MOSS BRANSON CAREER CENTER BRANSON CAREER	Merriam Village	(417)597-8269

Total Records: 85 Number Selected: 1

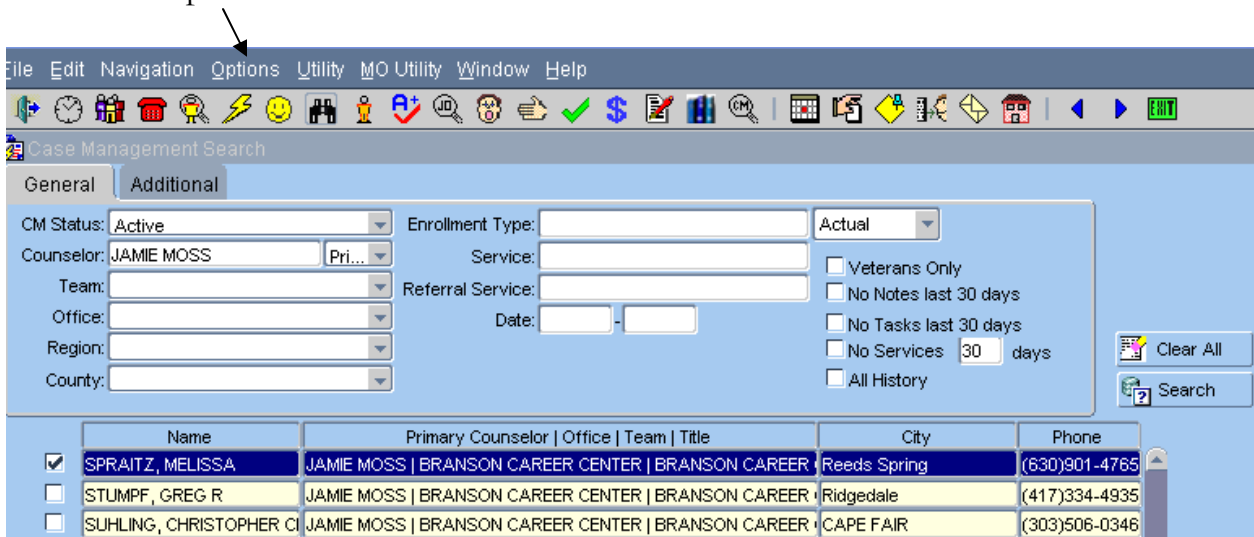
Destination: Seeker Info Tab

Select All DeSelect All Print Report Print List Excel

Click in box to select a specific case

Record: 75/85 <OSC>

4. Select 'Options' from the Toolbar:



File Edit Navigation Options Utility MO Utility Window Help

Case Management Search

General Additional

CM Status: Active Enrollment Type: Actual

Counselor: JAMIE MOSS Pri... Service:

Team: Referral Service:

Office: Date: -

Region:

County:

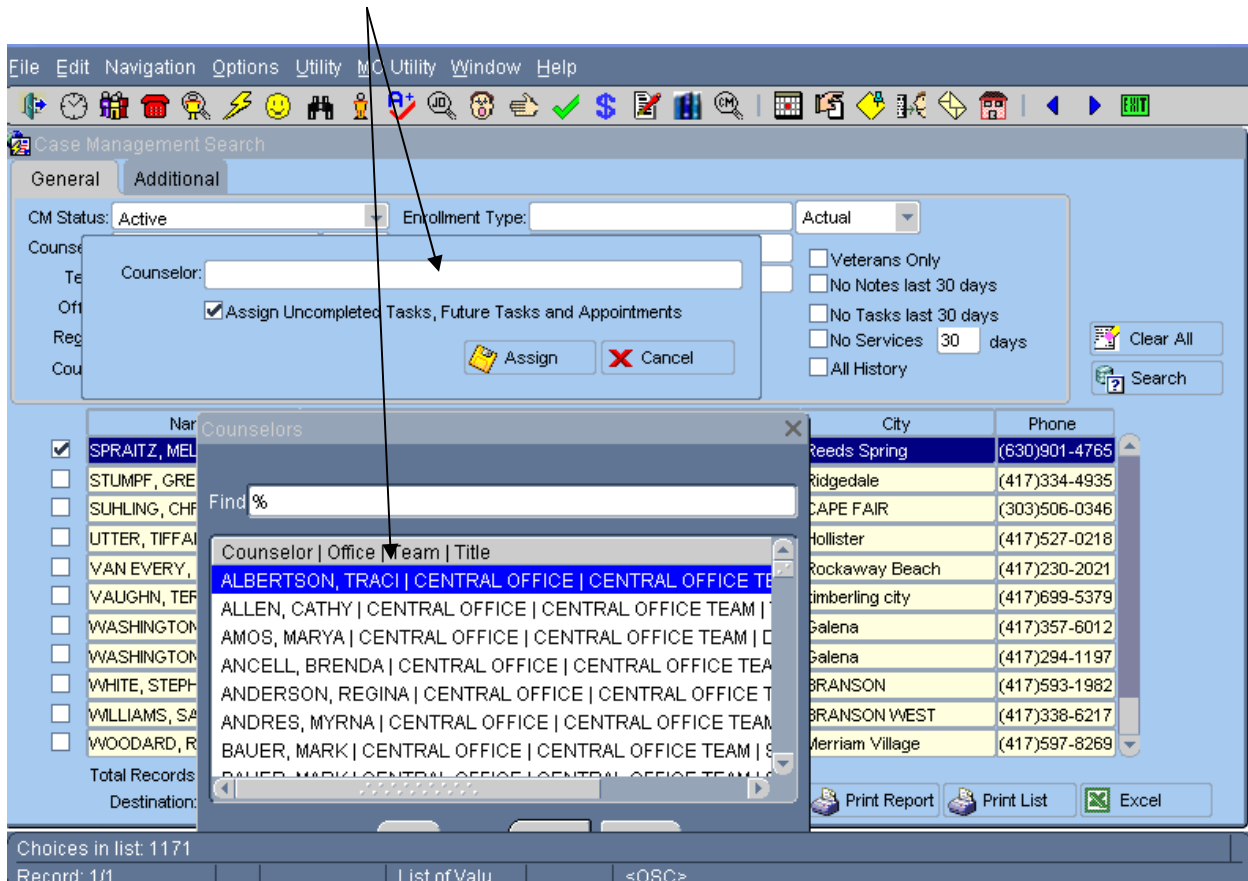
☐ Veterans Only
☐ No Notes last 30 days
☐ No Tasks last 30 days
☐ No Services 30 days
☐ All History

Clear All Search

Name	Primary Counselor Office Team Title	City	Phone
<input checked="" type="checkbox"/> SPRAITZ, MELISSA	JAMIE MOSS BRANSON CAREER CENTER BRANSON CAREER	Reeds Spring	(630)901-4765
<input type="checkbox"/> STUMPF, GREG R	JAMIE MOSS BRANSON CAREER CENTER BRANSON CAREER	Ridgedale	(417)334-4935
<input type="checkbox"/> SUHLING, CHRISTOPHER C	JAMIE MOSS BRANSON CAREER CENTER BRANSON CAREER	CAPE FAIR	(303)506-0346

5. Click 'Reassign Counselor' and F2.

6. Select the new counselor name.



Assigning Records

Question:

Why aren't the cases assigned by FSD Pay County instead of zip codes in Toolbox 2.0?

Answer:

This will be an enhancement in Toolbox 2.0.

AWEP/CWEP & Community Service

Question: *Updated 11/10/8*

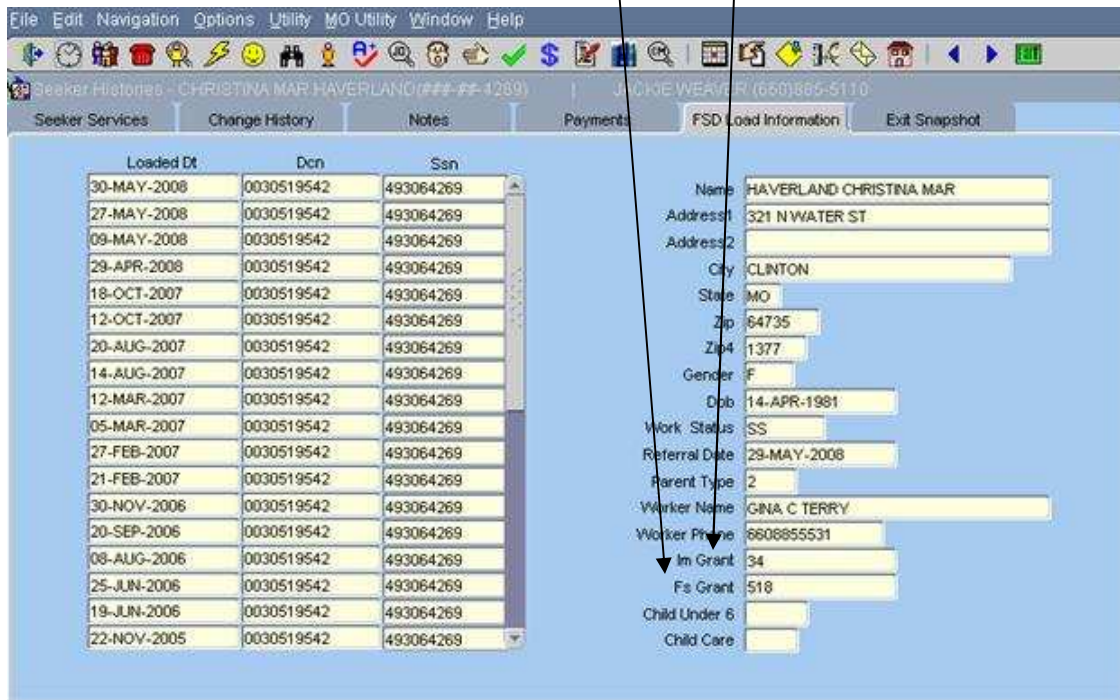
How is AWEP/CWEP and Community Service calculated in Toolbox 2.0?

Answer:

The TANF and FS amount (from the “Seeker History”, “FSD Load Information”) are added and divided by the state minimum wage (\$6.65). (Please note: the state minimum wage will increase to \$7.05 effective January 1, 2009.) This is the amount of hours that needs to be worked for the entire federal month as reflected in Toolbox 2.0.

The total monthly amount of hours cannot be exceeded due to FLSA rules. In addition, all of the monthly hours must be worked to receive participation. The case manager, recipient, and employer should work together to make sure there is enough flexibility to work varying hours and to make up hours in different weeks of the month.

Below is the ‘FSD Load Information’ with the ‘IM Grant’ (which stands for Income Maintenance and means TANF) and ‘FS Grant’ (which means Food Stamps):



File Edit Navigation Options Utility MOUtility Window Help

Seeker Histories - CHRISTINA MAR HAVERLAND(###-##-4269) | JOCKEWEAVER (650)865-5110

Seeker Services Change History Notes Payments **FSD Load Information** Exit Snapshot

Loaded Dt	Dcn	Ssn
30-MAY-2008	0030519542	493064269
27-MAY-2008	0030519542	493064269
09-MAY-2008	0030519542	493064269
29-APR-2008	0030519542	493064269
18-OCT-2007	0030519542	493064269
12-OCT-2007	0030519542	493064269
20-AUG-2007	0030519542	493064269
14-AUG-2007	0030519542	493064269
12-MAR-2007	0030519542	493064269
05-MAR-2007	0030519542	493064269
27-FEB-2007	0030519542	493064269
21-FEB-2007	0030519542	493064269
30-NOV-2006	0030519542	493064269
20-SEP-2006	0030519542	493064269
08-AUG-2006	0030519542	493064269
25-JUN-2006	0030519542	493064269
19-JUN-2006	0030519542	493064269
22-NOV-2005	0030519542	493064269

Name: HAVERLAND CHRISTINA MAR
 Address1: 321 N WATER ST
 Address2:
 City: CLINTON
 State: MO
 Zip: 64735
 Zip4: 1377
 Gender: F
 Dpb: 14-APR-1981
 Work Status: SS
 Referral Date: 29-MAY-2008
 Parent Type: 2
 Worker Name: GINA C TERRY
 Worker Phone: 8606855531
 Im Grant: 34
 Fs Grant: 518
 Child Under 6:
 Child Care:

Cancel Close

Question: *Added 9/23/8*

How will I know if a record is cancel closed?

Answer:

That information is writing to case notes. In addition, Central Office CAP staff will make a case note if reactivation has been requested.

CAP Appropriateness Tab

Question: *Updated 6/11/8*

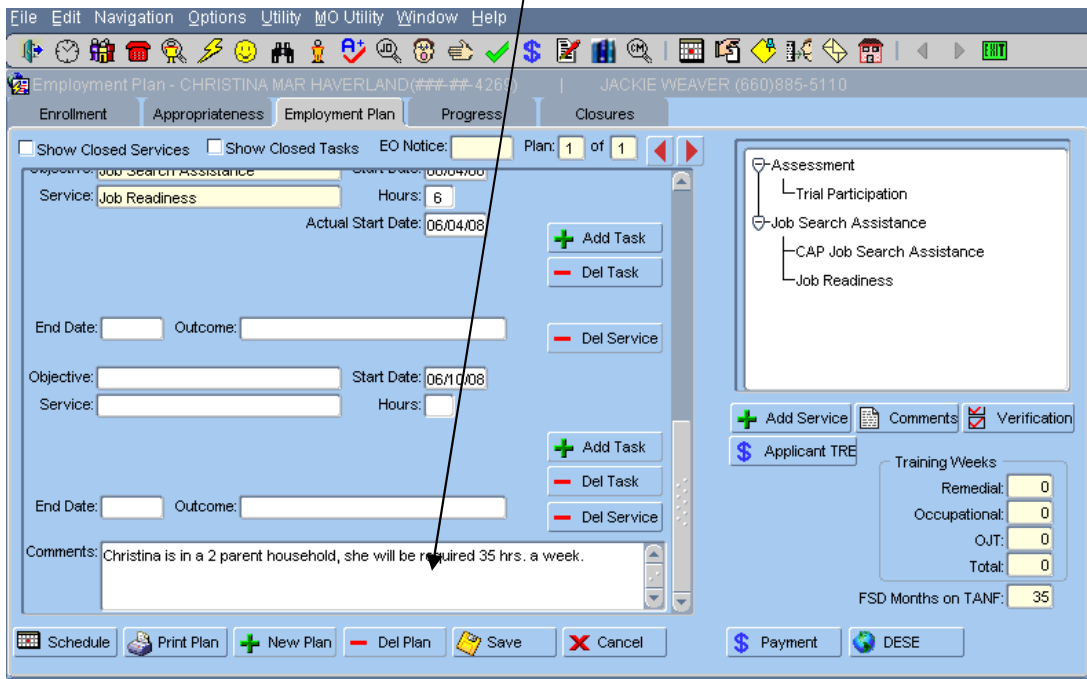
What should we do if we can't click on the 'CAP Appropriateness' tab during the IE process?

Answer:

If the 'CAP Appropriateness Tab' cannot be clicked on, the following should be completed:

1. Complete the IE process.
2. Gather the information for the tab during the IE process.

3. Include the information on the 'Comments' on the Employment Plan.



4. Send an email with the name, DCN, and inability to click on tab to Central Office CAP staff.
5. Central Office CAP staff will then request state level FSD manually allow IE compliance.

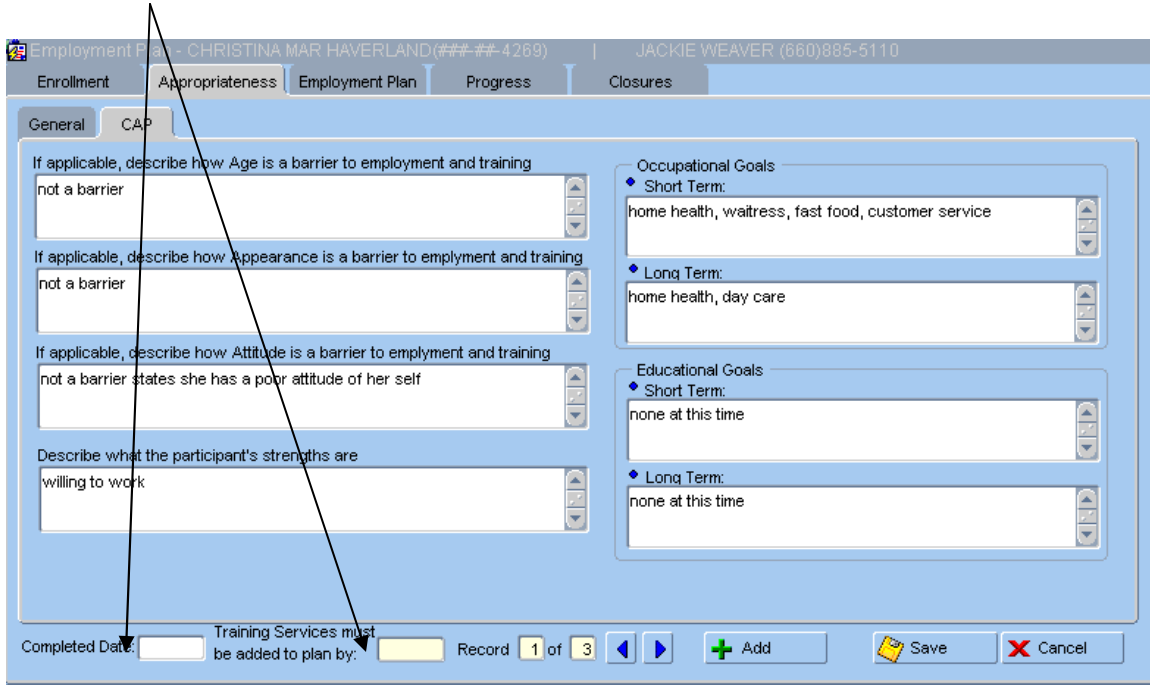
Question: *Updated 9/23/8*

Should we fill out the 'Completed Date' and 'Training Services must be added to plan by:' on the 'CAP Appropriateness Tab'?

Answer:

No, this is WIA functionality.

The below tabs that should not be completed for CAP Clients:



Employment Plan - CHRISTINA MAR HAVERLAND(###-##-4269) | JACKIE WEAVER (660)885-5110

Enrollment | Appropriateness | **Employment Plan** | Progress | Closures

General | **CAP**

If applicable, describe how Age is a barrier to employment and training
not a barrier

If applicable, describe how Appearance is a barrier to employment and training
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If applicable, describe how Attitude is a barrier to employment and training
not a barrier states she has a poor attitude of her self

Describe what the participant's strengths are
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Occupational Goals
♦ Short Term:
home health, waitress, fast food, customer service

♦ Long Term:
home health, day care

Educational Goals
♦ Short Term:
none at this time

♦ Long Term:
none at this time

Completed Date: Training Services must be added to plan by: Record 1 of 3 + Add Save Cancel

Question: *Updated 6/17/8*

Why won't the IE Compliance code show on the 'Seeker History' screen?

Answer:

If the 'CAP Appropriateness' tab was completed before the enrollment, the code will not save. Therefore, the TA Applicant enrollment must be completed prior to completing the 'CAP Appropriateness' tab.

Case Closures

Question: *Added 9/23/8*

Why am I getting a task stating "FSD has inactivated CAP for METP alert "Failed First Job Search | Batch" and then the CAP enrollment closes?

Answer:

This error has been corrected. Please let Central Office CAP staff know if this error occurs again.

Question: *Added 9/23/8*

When staff get a message in their “tasks” field from FSD stating “FSD has inactivated CAP for this client” and in the Seeker History the same message appears, does this mean the clients case has closed?

Answer:

Yes, this means the case was closed out. Anytime there is a work status change, the primary counselor will receive a task to inform him/her of that action. You can also look at the FSD Load Information to verify the last work status received for that individual.

Case Load

Question: *Added 11/10/8*

How do I get a client removed **from** my caseload when they are only a ‘Possible Enrollment’ and not ‘Active’?

Answer:

If a client is on your caseload, the client will stay there unless he/she moves, wants to be transferred, or the record closes.

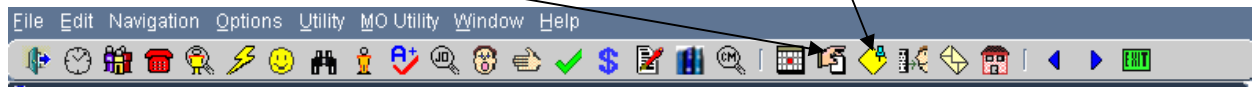
Case Notes

Question: *Added 6/3/8*

Why aren’t the case notes appearing correctly?

Answer:

Please make sure the counselors are selecting the 'Case Notes' icon and not the 'Tasks' icon.



Certificates/Licenses

Question: *Added 9/23/8*

Is there a place to enter licenses or certificates that are not listed in Toolbox 2.0?

Answer:

Yes.

1. Go to the 'Seeker Screen'
2. Click on the 'Edu/Cert' tab
3. Indicate type of either license or certificate.



4. Enter name of license or certificate (this is a free form field) and the date the license/certificate was obtained

Change Requests

Question: *Added 6/3/8*

How do we handle change requests for Toolbox 2.0?

Answer:

Use the same procedure used in the previous Toolbox until Tech Support releases a new process.

Closing Activities

Question: *Updated 11/10/8*

Should I close services when the case closes since Toolbox 2.0 is not doing this?

Answer:

Yes. Until this functionality is completed, you should close out the services if they notice them. However, this will not affect federal reporting if the service is left open since only actual hours are reported.

Comments

Question: *Updated 6/11/8*

How can comments on Employment Plan be updated and added if you are not the primary counselor?

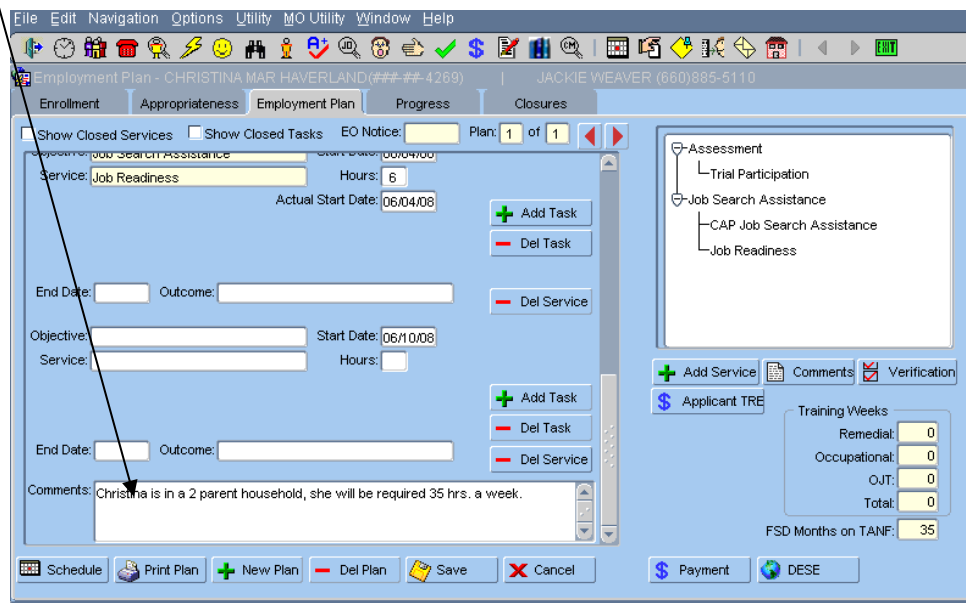
Answer:

According to Tech Support, the comments should function in this manner:

1. Another case manager (not his/her case) can add to the comments.
2. Another case manager can add new objectives and services.
3. Another case manager can add to (not delete any of) the comments.
4. Assigned case manager can delete all/any of comments and/or add to.

Since this is a universal function, please let Tech Support know if you experience problems.

‘Comments’ on the ‘Employment Plan’ tab:



Conciliation

Question: *Updated 6/25/8*

Do we need to restart the conciliation process in Toolbox 2.0?

Answer:

It depends on the situation.

- If the individual has been in conciliation and it has been past 10 days, attempt another contact. If you get no response, continue with the sanction process.
- If the individual was sent a letter with a sanction appointment and the process was not followed through due to the system, restart the conciliation process by sending another letter. Attempt one more contact and then continue with the sanction process.

Question: *Added 11/10/8*

Does the conciliation activity require hours to be entered?

Answer:

The hour field for conciliation should be left blank since it will not allow the entry of '0' hours. ITSD will automatically send '0' hours to FSD for recording purposes.

Daily FSD File

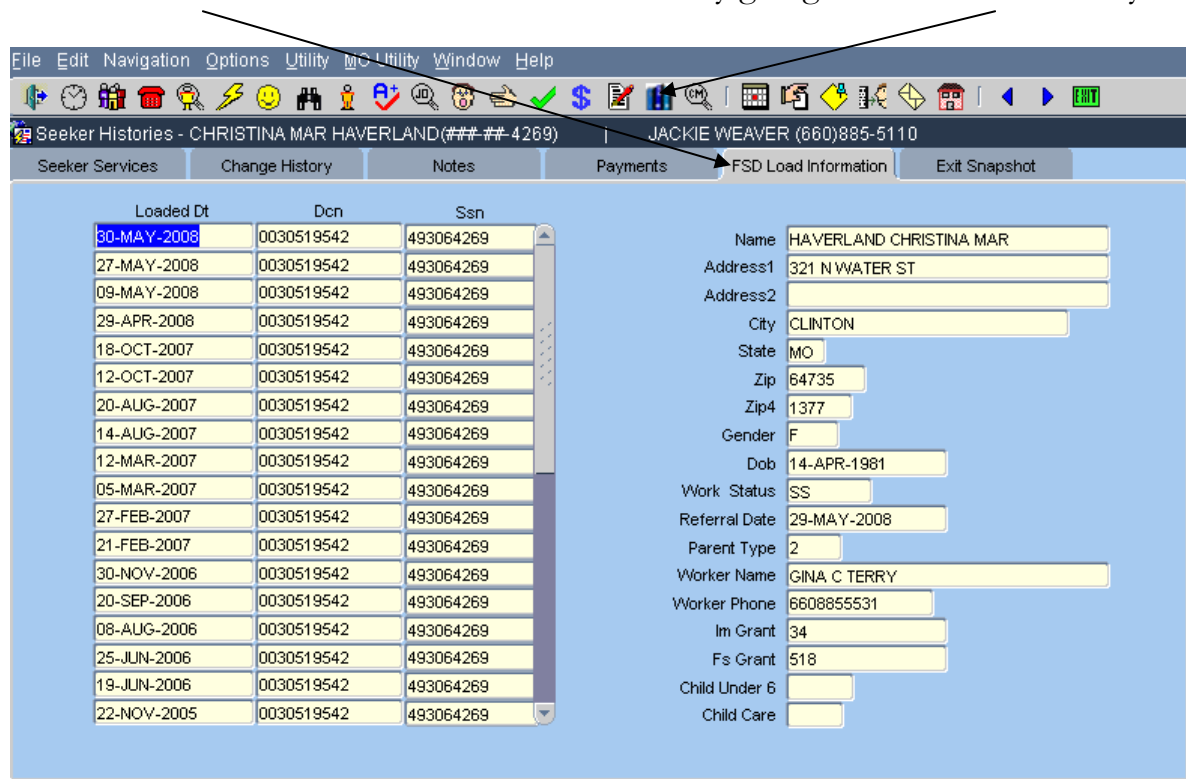
Question: *Updated 6/11/8*

Where is the Daily FSD file in Toolbox 2.0?

Answer:

It is under "Seeker History" and "FSD Daily Load".

The 'FSD Load Information' tab can be found by going to the 'Seeker History'.



Loaded Dt	Dcn	Ssn
30-MAY-2008	0030519542	493064269
27-MAY-2008	0030519542	493064269
09-MAY-2008	0030519542	493064269
29-APR-2008	0030519542	493064269
18-OCT-2007	0030519542	493064269
12-OCT-2007	0030519542	493064269
20-AUG-2007	0030519542	493064269
14-AUG-2007	0030519542	493064269
12-MAR-2007	0030519542	493064269
05-MAR-2007	0030519542	493064269
27-FEB-2007	0030519542	493064269
21-FEB-2007	0030519542	493064269
30-NOV-2006	0030519542	493064269
20-SEP-2006	0030519542	493064269
08-AUG-2006	0030519542	493064269
25-JUN-2006	0030519542	493064269
19-JUN-2006	0030519542	493064269
22-NOV-2005	0030519542	493064269

Name: HAVERLAND CHRISTINA MAR
 Address1: 321 N WATER ST
 Address2:
 City: CLINTON
 State: MO
 Zip: 64735
 Zip4: 1377
 Gender: F
 Dob: 14-APR-1981
 Work Status: SS
 Referral Date: 29-MAY-2008
 Parent Type: 2
 Worker Name: GINA C TERRY
 Worker Phone: 6608855531
 Im Grant: 34
 Fs Grant: 518
 Child Under 6:
 Child Care:

Question: *Added 9/23/8*

Why is there a 'D' or an 'M' in the lower right hand corner of the 'Seeker Histories' and 'FSD Load Information' screen?

Seeker Histories - HINDE S ABDI(### ## 1270) | DEBORAH STOVALL (314)746-0754

Seeker Services | Change History | Notes | Payments | FSD Load Information | Exit Snapshot

Loaded Dt	Dcn	Ssn
08/20/2008	0062751040	121921270
07/11/2008	0062751040	121921270
07/02/2008	0062751040	121921270
07/01/2008	0062751040	121921270
06/11/2008	0062751040	121921270
06/04/2008	0062751040	121921270
05/22/2008	0062751040	121921270
04/23/2008	0062751040	121921270
09/10/2007	0062751040	121921270
08/13/2007	0062751040	121921270

Name: ABDI HINDE S
 Address1: 3114 MIAMI ST APT A
 Address2:
 City: SAINT LOUIS
 State: MO Zip: 63118 Zip4: 3636
 Gender: F
 Dob: 01/01/1990
 Work Status: DD
 Referral Date: 06/30/2008
 Parent Type: 2
 Worker Name: GLENDA HANSHAW
 Worker Phone: 3149337000
 Im Grant: 282
 Fs Grant: 284
 Child Under 6:
 Child Care:
 Tanf Months: 00
 File Source: D

FSD Daily Load Indicator

Deleting Enrollments

Question: *Added 6/11/8*

Why can't I 'OOPS!' an enrollment?

Answer:

If there is an alert sent after the individual was enrolled, this functionality is not available. You will need to delete the alert prior to doing the 'OOPS!' on the enrollment.

Domestic Violence

Question: *Added 9/23/8*

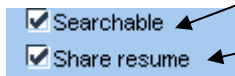
Should I complete the Domestic Violence screen in the Assessment?

Answer:

No. The Domestic Violence screens should not be completed for CAP clients. The current Domestic Violence policy and forms should be used. This form is available under the 'Forms Manager'.

Question: *Added 9/23/8*

When I restrict a record for a victim of domestic violence, does it automatically “uncheck” the boxes of ‘Searchable’ and ‘Share Resume’?



Answer:

No, it does not “uncheck” these boxes. The restriction works the same way as it did in Toolbox. Therefore, if those boxes are not checked, it turns off the public side which means employers will not be able to view information on the MissouriCareerSource! Site, and the client’s employment search and unemployment insurance entry requirements will have to be staff-assisted.

Employment Plan

Question: *Updated 11/10/8*

If the TA recipient’s case closes and he/she is not in any other programs, should I close the employment plan out?

Answer:

Since the Employment Plan is used by all programs, you have to be very sure not to prematurely close it. If you know for sure the individual is not working with any labor exchange-related services, is not working with any other programs (like WIA, Trade Act, etc.), and will not be receiving post-employment supportive services for 90 days, then it is permissible to close the Employment Plan and inactivate case manager. The Employment Plan must be closed before you can inactivate the record for case management.

Enrollments

Question: *Added 6/3/8*

Why am I getting this message “Cannot enrollment in this program (Permission Denied)” when I tried to enroll a client?

Answer:

You will have to have the right “hat” on (i.e. CAP or METP) to enroll the client. If you do not have appropriate permissions, contact Tech Support at DWDSupport@ded.mo.gov.

Question: *Added 6/3/8*

Should I close an enrollment if the case is closed on the daily FSD file?

Answer:

Enrollments should only be closed by the system. The system is incorrectly allowing field staff to close the enrollments at this point. After the system is operating properly, the enrollments should close based on the FSD Daily Load.

Question: *Updated 7/30/8*

Why isn’t the appointment populating to the scheduler when case managers send call-in letters to TA recipients?

Answer:

According to the programmers, this has been partially corrected. Please continue to check the ‘FSD Daily Load’ Information on the ‘Seeker History’ to verify the status and report any errors to Central Office CAP staff.

Question: *Added 9/23/8*

Why can’t I enroll some customers in Toolbox 2.0?

Answer:

First check to see if there is a counselor assigned. A counselor must be assigned before an enrollment is allowed.

Question: *Added 11/10/8*

What does “CAP Job Readiness System Closed-Client Auto Enrolled mean” on the ‘Seeker Histories’ mean?

Answer:

This means the applicant activity was closed due to the recipient auto enrollment. *If the applicant was in an activity*, the activity also transferred to the recipient phase.

Question: *Added 11/10/8*

How does an enrollment *display* in Toolbox 2.0?

Answer:

Once an enrollment is completed, the following will *display* in the ‘Seeker Histories’, ‘Seeker Services’ tab:

- Close date: Equivalent to the date the enrollment occurred; and
- Name of counselor: Name of the counselor who is logged in and performs the actual enrollment in the system.

This resulted from a programmatic need for UI Profiling to create additional information on the UI Profiling Possible description when those particular records display an ‘exempt’ or a ‘no show’.

Error Message

Question: *Added 11/10/8*

Why did I get the following message?

“FRM-40654 Record has been updated by another user. Requery to see change.”

Answer:

When you are adding a service to an Employment Plan and click 'Save' and click the service again without any changes, you will get this error. If this happens, please email DWD Support and provide the APPID of the client and the steps you took when the error appeared.

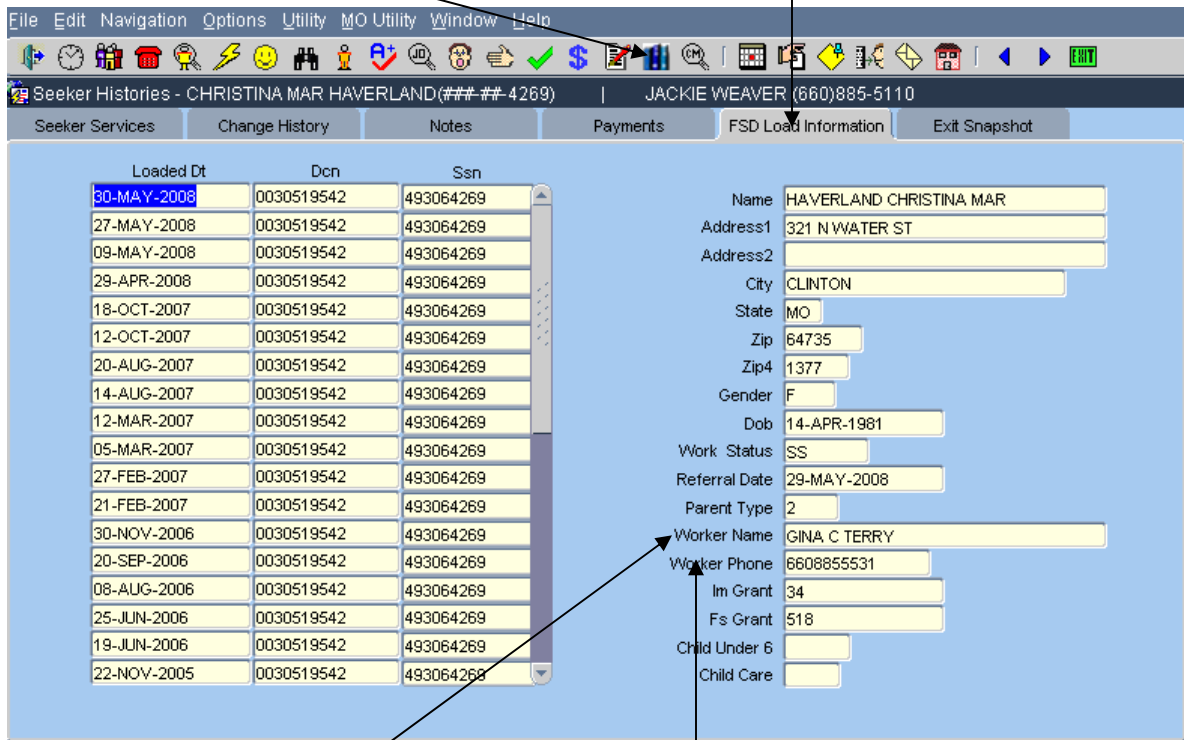
FSD Case Worker

Question: *Updated 7/30/8*

Where is the FSD case worker displayed in Toolbox 2.0?

Answer:

By clicking on the 'Seeker History' and the 'FSD Load Information'.



Loaded Dt	Dcn	Ssn
30-MAY-2008	0030519542	493064269
27-MAY-2008	0030519542	493064269
09-MAY-2008	0030519542	493064269
29-APR-2008	0030519542	493064269
18-OCT-2007	0030519542	493064269
12-OCT-2007	0030519542	493064269
20-AUG-2007	0030519542	493064269
14-AUG-2007	0030519542	493064269
12-MAR-2007	0030519542	493064269
05-MAR-2007	0030519542	493064269
27-FEB-2007	0030519542	493064269
21-FEB-2007	0030519542	493064269
30-NOV-2006	0030519542	493064269
20-SEP-2006	0030519542	493064269
08-AUG-2006	0030519542	493064269
25-JUN-2006	0030519542	493064269
19-JUN-2006	0030519542	493064269
22-NOV-2005	0030519542	493064269

Name: HAVERLAND CHRISTINA MAR
 Address1: 321 N WATER ST
 Address2:
 City: CLINTON
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 Zip: 64735
 Zip4: 1377
 Gender: F
 Dob: 14-APR-1981
 Work Status: SS
 Referral Date: 29-MAY-2008
 Parent Type: 2
 Worker Name: GINA C TERRY
 Worker Phone: 6608855531
 Im Grant: 34
 Fs Grant: 518
 Child Under 6:
 Child Care:

The FSD case worker's name and phone number appears above.

GED

Question: *Updated 7/30/8*

When a client takes the GED test, when do we enter it in Toolbox 2.0 and what outcome do we enter?

For example:

- Client took GED test on July 12th
- The start date and end date would be July 12th
- However, the end date can't be entered without an outcome

Answer:

In this scenario, the service can wait to be entered until the test score is received since the outcome will not be known without the test score.

Highlighted Information

Question:

Why is some of the information “grayed out” in Toolbox 2.0?

Answer:

Anything that is “grayed out” is conversion data from Toolbox.

Question:

Why is some of the information “yellowed out” in Toolbox 2.0?

Answer:

Anything that is “yellowed out” is not editable.

Immediate Engagement

Question:

What constitutes Immediate Engagement compliance in Toolbox 2.0?

Answer:

Immediate Engagement compliance requirements have not changed. Missouri Career Source, Enrollment, Assessment, and a Follow-up Appointment will need to be completed.

Incorrect Service

Question: *Added 9/23/8*

Shouldn't I be able to delete an incorrect service the same day it is entered?

Answer:

No. If you enter an incorrect service, close the service with an outcome of "Service in Error". This is the same as actually deleting the service.

Letters

Question: *Updated 9/23/8*

How can I delete letters?

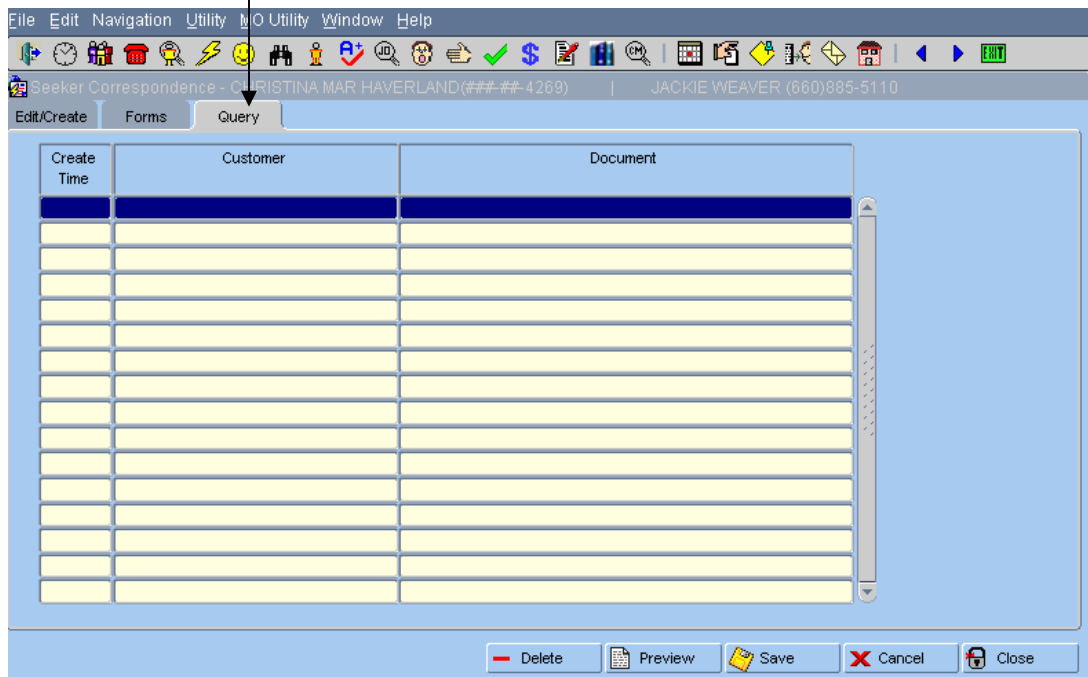
Answer:

Letters can either be individually deleted or deleted as a group.

Individual deletion:

1. Go to 'Seeker Correspondence' (Yellow envelope icon).


2. Click on 'Query' tab.



3. Highlight letters you wish to delete.

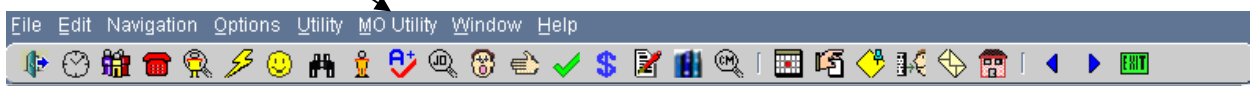
4. Click on the 'Delete' button.

Individual deletion:

1. Click on the 'Seeker Histories' tab. 
2. Highlight the name of the letter you wish to delete.
3. Click the 'Delete' button located in the bottom left portion of the screen.

Group deletion:

1. Select 'MO Utility' on the toolbar.



2. Select Call-in Letters.
3. Select the location of the letters that were sent. Then select the type of call-in letter that was sent. Click search.
4. Select the Review Letters tab.

5. Click on Select All and hit the Delete button.

Question: *Updated 6/25/8*

Why are the free-form letters showing “Not Mailed”?

Answer:

The free-form letters will show “Not Mailed” since they are sent locally and not through DWD’s portal.

Question: *Updated 7/30/8*

Why isn’t the appointment populating to the scheduler when case managers send call-in letters to TA recipients?

Answer:

It is not populating because many times the TA recipient will not come in for their appointment. In addition, in some areas one person sends the call-in letters and all of these appointments would populate to their scheduler.

Question: *Added 9/23/8*

Why doesn’t the date and time appear on the conciliation letter since that is an option when creating the letter?

Answer:

The conciliation letter does not have date and time in the language of the letter. Idealistically, this information should not display for entry.

Question: *Added 9/23/8*

Will the reengagement letters automatically resend from Toolbox 2.0?

Answer:

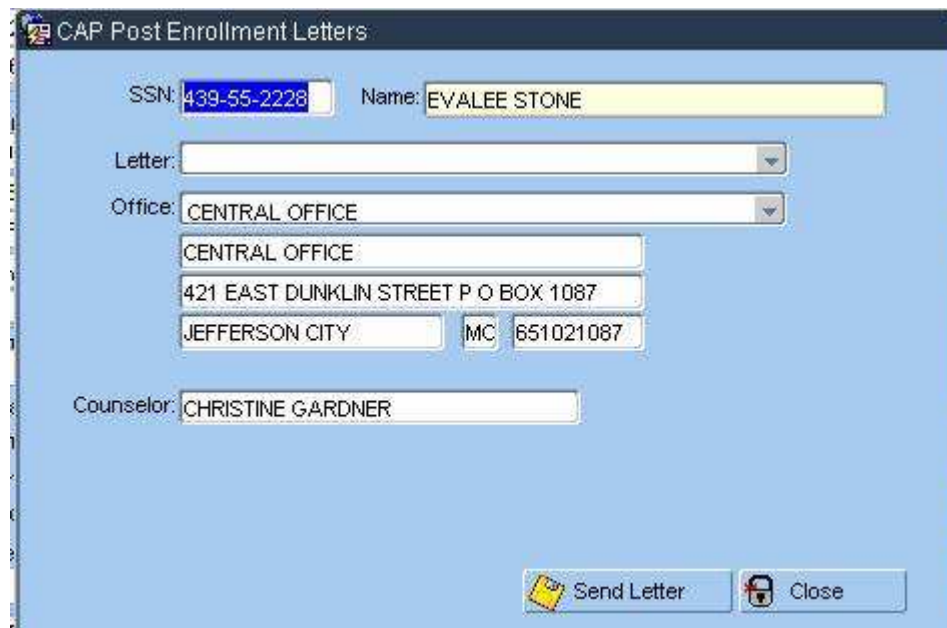
Yes. Toolbox 2.0 should be automatically resending the reengagement letters every 30 days. If this is not functioning properly, please send an email to Central Office CAP staff.

Question: *Added 9/23/8*

How do I send a post-enrollment letter?

Answer:

1. Select 'Options' on the menu bar.
2. Select 'MO Program Specific' from the list.
3. Select 'CAP Post-Enrollment Letters'. The below pop-up box will display.



The screenshot shows a window titled "CAP Post Enrollment Letters". It contains the following fields:

- SSN: 439-55-2228
- Name: EVALEE STONE
- Letter: (dropdown menu)
- Office: CENTRAL OFFICE (dropdown menu)
- Address: CENTRAL OFFICE, 421 EAST DUNKLIN STREET P O BOX 1087, JEFFERSON CITY, MO 651021087
- Counselor: CHRISTINE GARDNER
- Buttons: Send Letter, Close

4. Complete the necessary information required to send the letter. Hit the 'Send Letter' button.

Question: *Added 9/23/8*

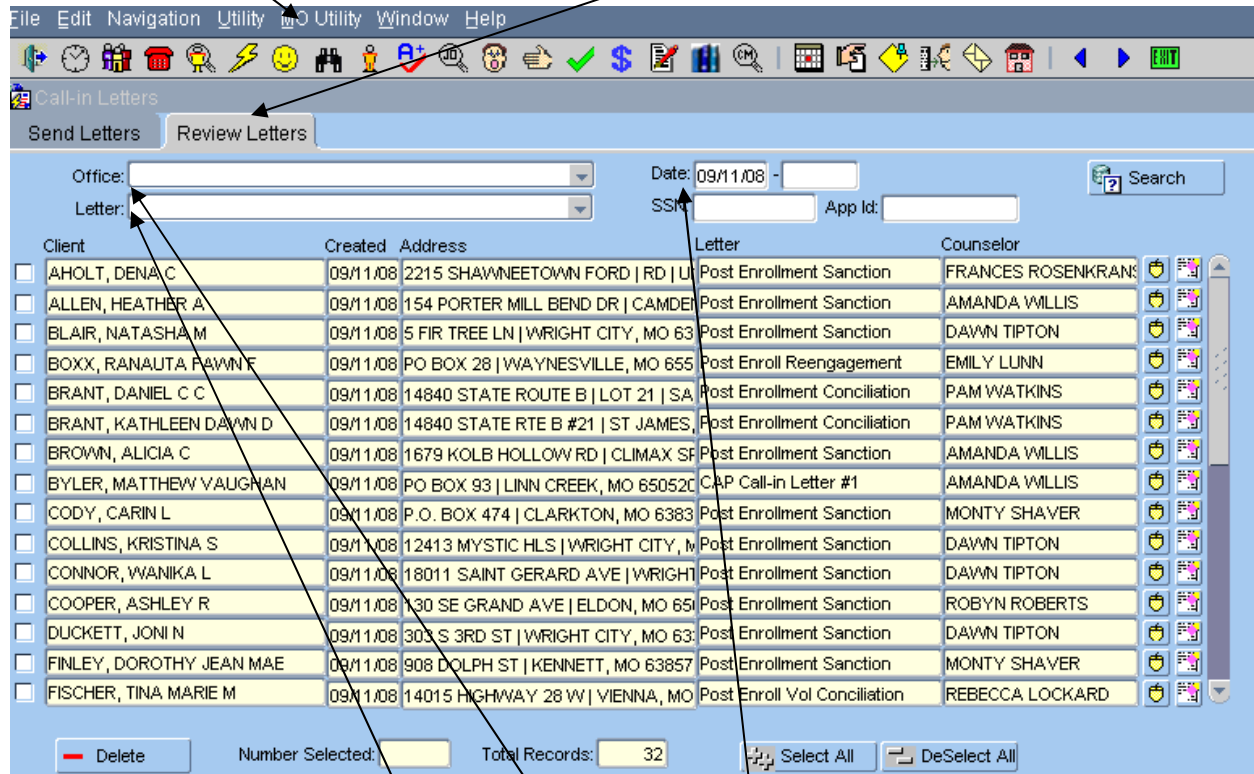
How can I review letters?

Answer:

You can review letters by double-clicking on the letter name from the 'Seeker Histories' screen or through the Call-In Letters List.

To review from the Call-In Letters List:

Click on 'MO Utility', 'Call-In Letters', and 'Review Letters'.



Client	Created	Address	Letter	Counselor
AHOLT, DENA C	09/11/08	2215 SHAWNEETOWN FORD RD U	Post Enrollment Sanction	FRANCES ROSENKRANS
ALLEN, HEATHER A	09/11/08	154 PORTER MILL BEND DR CAMDEN	Post Enrollment Sanction	AMANDA WILLIS
BLAIR, NATASHA M	09/11/08	5 FIR TREE LN WRIGHT CITY, MO 63	Post Enrollment Sanction	DAVN TIPTON
BOXX, RANAUTA PAWN F	09/11/08	PO BOX 28 WAYNESVILLE, MO 655	Post Enroll Reengagement	EMILY LUNN
BRANT, DANIEL C C	09/11/08	14840 STATE ROUTE B LOT 21 SA	Post Enrollment Conciliation	PAM WATKINS
BRANT, KATHLEEN DAWN D	09/11/08	14840 STATE RTE B #21 ST JAMES,	Post Enrollment Conciliation	PAM WATKINS
BROWN, ALICIA C	09/11/08	1679 KOLB HOLLOW RD CLIMAX SP	Post Enrollment Sanction	AMANDA WILLIS
BYLER, MATTHEW VAUGHAN	09/11/08	PO BOX 93 LINN CREEK, MO 650520	CAP Call-in Letter #1	AMANDA WILLIS
CODY, CARIN L	09/11/08	P.O. BOX 474 CLARKTON, MO 6383	Post Enrollment Sanction	MONTY SHAVER
COLLINS, KRISTINA S	09/11/08	12413 MYSTIC HLS WRIGHT CITY, M	Post Enrollment Sanction	DAVN TIPTON
CONNOR, WANIKA L	09/11/08	18011 SAINT GERARD AVE WRIGHT	Post Enrollment Sanction	DAVN TIPTON
COOPER, ASHLEY R	09/11/08	130 SE GRAND AVE ELDON, MO 65	Post Enrollment Sanction	ROBYN ROBERTS
DUCKETT, JONI N	09/11/08	303 S 3RD ST WRIGHT CITY, MO 63	Post Enrollment Sanction	DAVN TIPTON
FINLEY, DOROTHY JEAN MAE	09/11/08	908 DOLPH ST KENNETT, MO 63857	Post Enrollment Sanction	MONTY SHAVER
FISCHER, TINA MARIE M	09/11/08	14015 HIGHWAY 28 W VIENNA, MO	Post Enroll Vol Conciliation	REBECCA LOCKARD

You can then search by Letter Type, Office, and Date to find the reengagement letter sent.

Question: *Added 9/23/8*

Will there be further enhancements with the letters?

Answer:

Yes.

1. The order of the letters in the drop-down box will be rearranged.

2. The tab order on the pop-up box will be adjusted to facilitate inputting the text fields. (i.e., appointment date, time, duration, etc.)
3. The 'Delete Correspondence' button will be added to the 'Seeker Histories' tab when sending the Post-Enrollment Sanction letter.

Question: *Added 11/10/8*

Why won't Toolbox 2.0 allow me to delete a call-in letter after the day it was sent?

Answer:

Toolbox 2.0 was allowing this in error. The Letter policy has not changed and letter deletion is only allowed the same day the letter is entered in Toolbox 2.0 since the letters are mailed the next morning.

If a letter was sent in error and not deleted, Central Office CAP staff can be notified prior to 8:30 the following morning so the letter can be pulled. If the letter was sent in error, not deleted, and not pulled, the customer should be notified of the error and case notes should be written.

Question: *Added 11/10/8*

Why isn't "CAP" on the free form letter listing?

Answer:

Previously "CAP" was on the free-form listing and this is where the call-in letters could be edited. Now the call-in letters can be edited from the 'Review' tab on the 'Call-in' Letter screen. If any free-form letters need to be sent for CAP, the 'General' tab should be used.

Location Logged Into

Question: *Added 6/3/8*

If a case manager is logged in under one county but are working with a client from another county, does the case manager need to switch counties before serving the client?

Answer:

No. They do not need to switch counties, the case managers should be logged on wherever they are serving the client. If the case manager is entering information at a later time, they should still enter the information based on where the cm served the client.

MQ

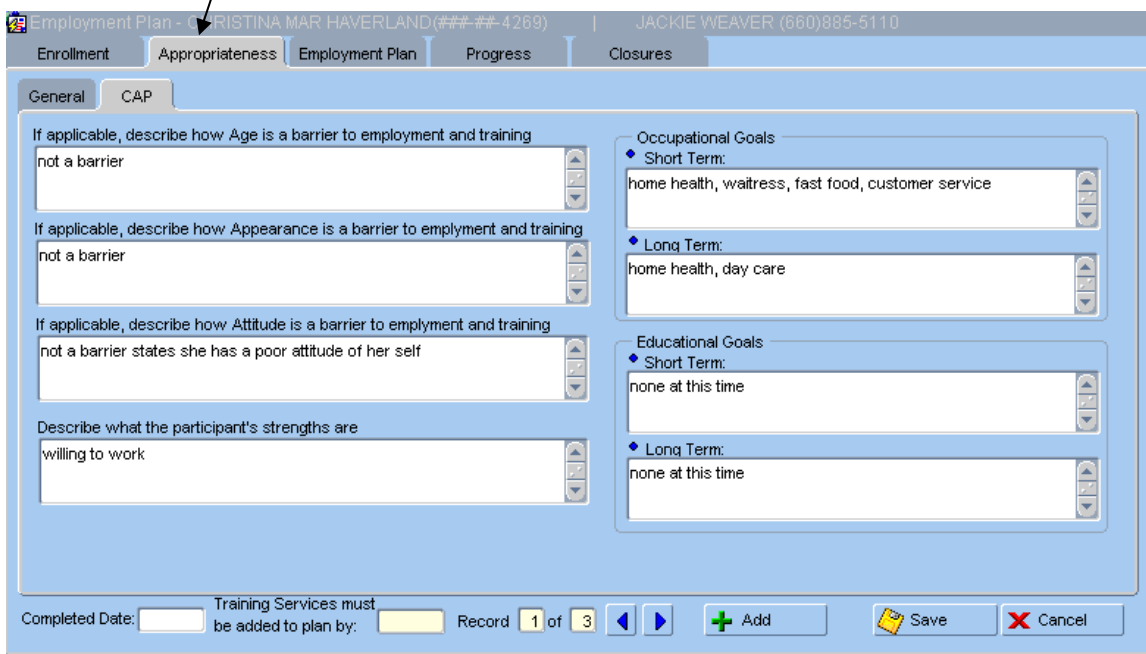
Question: *Updated 6/11/8*

What should we do if MQ doesn't work?

Answer:

If the MQ process isn't functioning, the following protocol should be followed:

1. Verify with FSD the individual is required to complete IE.
2. Complete the assessment and Missouri Career Source information.
3. Obtain the information for the 'CAP Appropriateness' tab.
4. After the referral comes in the overnight file, enroll and complete the 'CAP Appropriateness' tab which will send the IE compliance alert.



Employment Plan - CRISTINA MAR HAVERLAND(###-##-4269) | JACKIE WEAVER (660)885-5110

Enrollment | **Appropriateness** | Employment Plan | Progress | Closures

General | **CAP**

If applicable, describe how Age is a barrier to employment and training
not a barrier

If applicable, describe how Appearance is a barrier to employment and training
not a barrier

If applicable, describe how Attitude is a barrier to employment and training
not a barrier states she has a poor attitude of her self

Describe what the participant's strengths are
willing to work

Occupational Goals
♦ Short Term:
home health, waitress, fast food, customer service

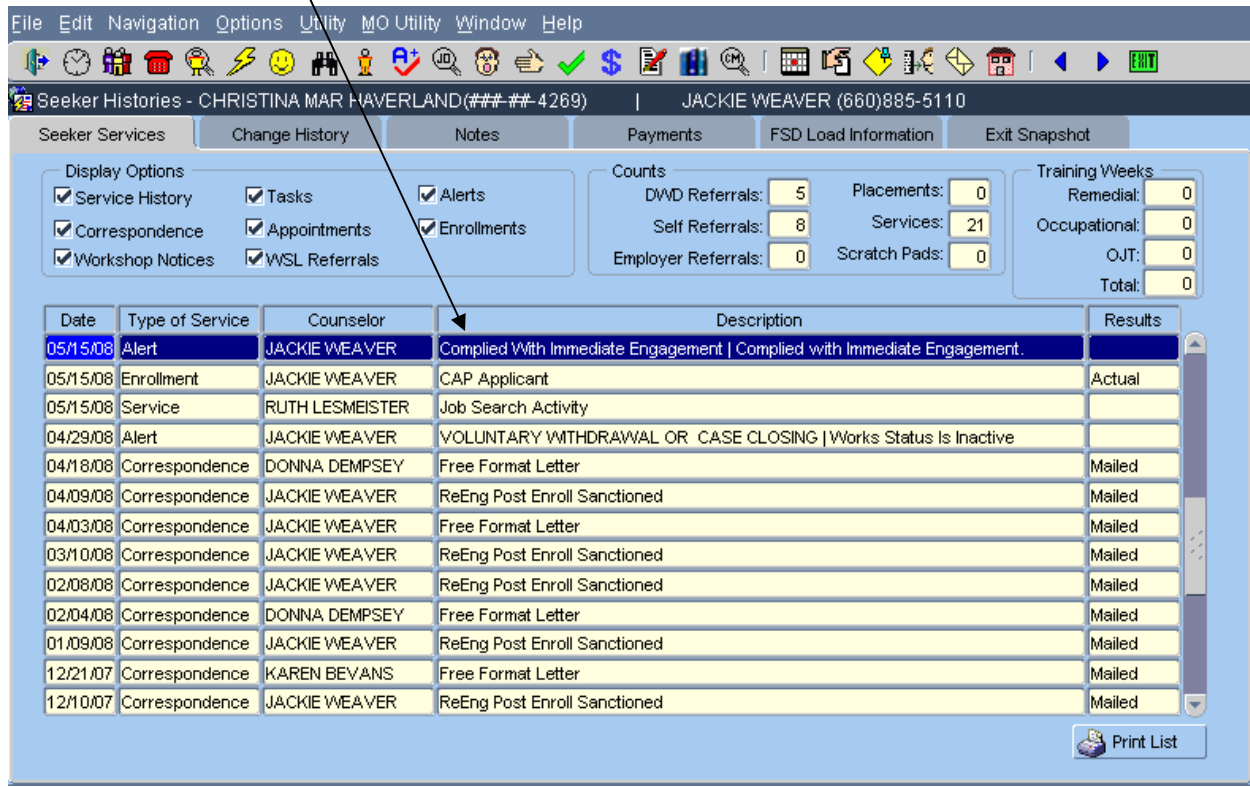
♦ Long Term:
home health, day care

Educational Goals
♦ Short Term:
none at this time

♦ Long Term:
none at this time

Completed Date: Training Services must be added to plan by: Record 1 of 3 + Add Save Cancel

5. Verify the IE compliance code shows on the 'Seeker History' screen.



Seeker Histories - CHRISTINA MAR HAVERLAND(###-##-4269) | JACKIE WEAVER (660)885-5110

Seeker Services | Change History | Notes | Payments | FSD Load Information | Exit Snapshot

Display Options:
☒ Service History
☒ Correspondence
☒ Workshop Notices
☒ Tasks
☒ Appointments
☒ WSL Referrals
☒ Alerts
☒ Enrollments

Counts:
 DVD Referrals: 5
 Self Referrals: 8
 Employer Referrals: 0
 Placements: 0
 Services: 21
 Scratch Pads: 0

Training Weeks:
 Remedial: 0
 Occupational: 0
 OJT: 0
 Total: 0

Date	Type of Service	Counselor	Description	Results
05/15/08	Alert	JACKIE WEAVER	Complied With Immediate Engagement Complied with Immediate Engagement.	
05/15/08	Enrollment	JACKIE WEAVER	CAP Applicant	Actual
05/15/08	Service	RUTH LESMEISTER	Job Search Activity	
04/29/08	Alert	JACKIE WEAVER	VOLUNTARY WITHDRAWAL OR CASE CLOSING Works Status Is Inactive	
04/18/08	Correspondence	DONNA DEMPSEY	Free Format Letter	Mailed
04/09/08	Correspondence	JACKIE WEAVER	ReEng Post Enroll Sanctioned	Mailed
04/03/08	Correspondence	JACKIE WEAVER	Free Format Letter	Mailed
03/10/08	Correspondence	JACKIE WEAVER	ReEng Post Enroll Sanctioned	Mailed
02/08/08	Correspondence	JACKIE WEAVER	ReEng Post Enroll Sanctioned	Mailed
02/04/08	Correspondence	DONNA DEMPSEY	Free Format Letter	Mailed
01/09/08	Correspondence	JACKIE WEAVER	ReEng Post Enroll Sanctioned	Mailed
12/21/07	Correspondence	KAREN BEVANS	Free Format Letter	Mailed
12/10/07	Correspondence	JACKIE WEAVER	ReEng Post Enroll Sanctioned	Mailed

Print List

Objectives

Question: *Added 6/2/8*

Why is conciliation under Life Skills Objective?

Answer:

This service was listed under the wrong objective. This has since been removed from Life Skills and should only display under the Assessment Objective.

Outcomes

Question: *Added 10/8/8*

What outcomes have been changed in Toolbox 2.0?

Answer:

Effective October 3, 2008, the following changes to outcomes have been implemented:

1. 'Assets Exceed Limits' was removed from the 'CAP Unsubsidized Paid Employment' service since this outcome is for Trade Act.
2. 'Employed' was changed to 'Employment Obtained' for the 'CAP Job Search Assistance' service.
3. The following were removed from the 'CAP Basic Skills Remediation' service since these outcomes are for Trade Act:
 - Deceased;
 - Did Not Complete-Justifiable;
 - Did Not Complete-Unjustifiable;
 - Family Care;
 - Health-Medical;
 - Institutionalized; and
 - Reservist-Called to Active Duty.
4. 'Did Not Complete' was added to 'CAP Basic Skills Remediation'.

Question: *Added 11/10/8*

What should be entered as an outcome if the client does **not** complete the activity (i.e. only does 15 hours of job search instead of 20)?

Answer:

The outcome "Did Not Complete" should be entered. Then the hours that were completed should be entered on the Verification tab. The entered hours will be sent to FSD for federal reporting.

Question: *Added 11/10/8*

Why was 'Advanced Degree Obtained' added as an outcome to the 'Occupational/Vocational Education' service?

Answer:

This was added as an outcome since per the final federal regulations, advanced degrees (i.e. Master's Degree) are now allowed for the Vocational Education and Training activity. Please note the 12 month lifetime limit per TA recipient still applies.

Question: *Added 11/10/8*

What should be done if an activity is entered in error?

Answer:

The outcome "Service in Error" should be entered. If another activity should have been entered, the correct activity should be entered and a change request should be submitted to back date the activity. Please note "Service in error" is not sent to FSD for federal reporting.

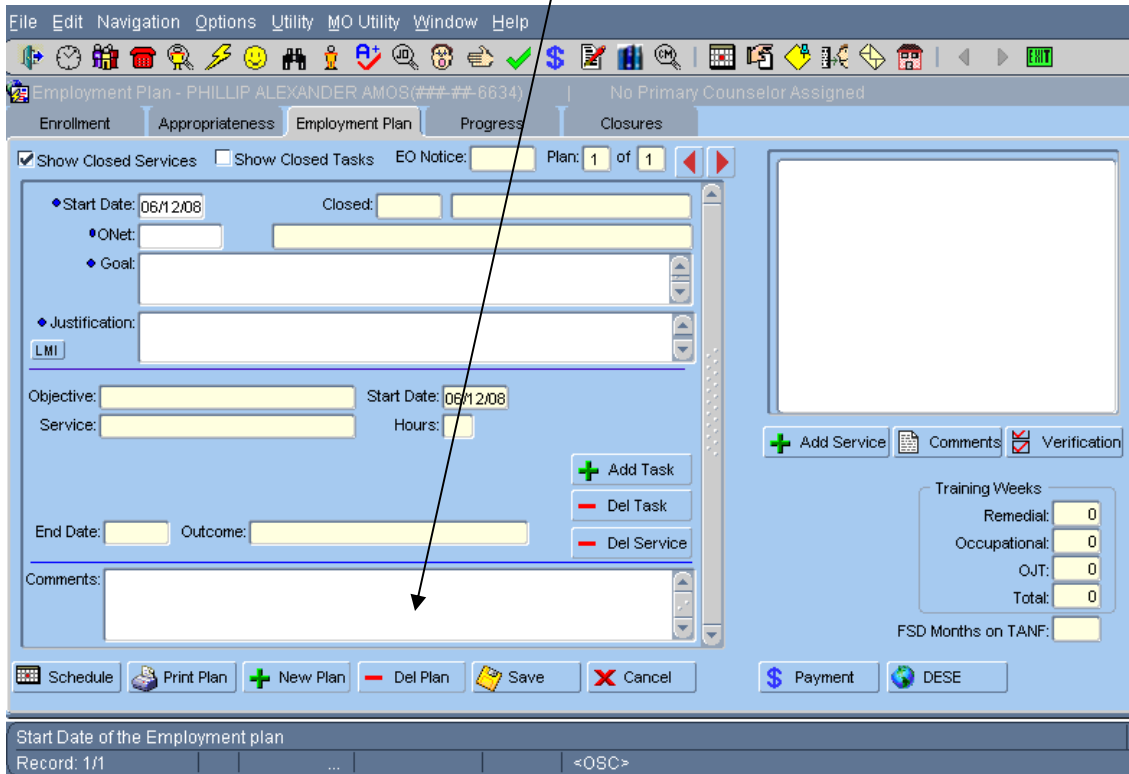
Participation Hours

Question: *Added 6/12/8*

Where should the required hours of participation be recorded in Toolbox 2.0?

Answer:

The required number of hours should be noted in the 'Employment Plan Screen on the 'Employment Plan' tab in the 'Comments' Field.



Permissions

Question: *Added 6/3/8*

What if we can't access various portions of Toolbox 2.0?

Answer:

These are permissions and need to be granted through Tech Support. The requests can be emailed to DWDSupport@ded.mo.gov.

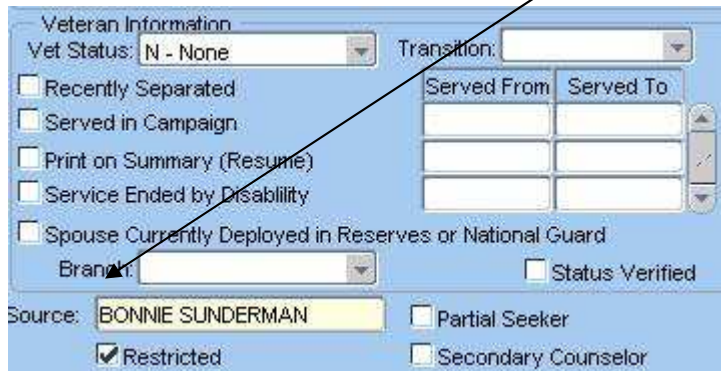
Restricting/Unrestricting Records

Question: *Added 9/23/8*

How do I unrestrict a record?

Answer:

There should be someone in your office that has the capability to unrestrict a record. The person with this access simply clicks on the “Restricted” check box located on the ‘Seeker Info’ tab. This information will write to the ‘Seeker Histories’ and a case note must be entered for documentation.



Prior to unrestricting a CAP record, a written statement must be obtained from the customer indicating that he/she no longer requires the record to be restricted.

If you had the ability to unrestrict a record in the previous Toolbox system and you no longer have this capability, a request needs to be submitted through your “authorized representative” to DWD Tech Support for processing.

Secondary Counselor

Question: *Added 9/23/8*

Where does Toolbox 2.0 show the secondary counselor?

Answer:

This is shown on the “Counselor Information” screen.

Services

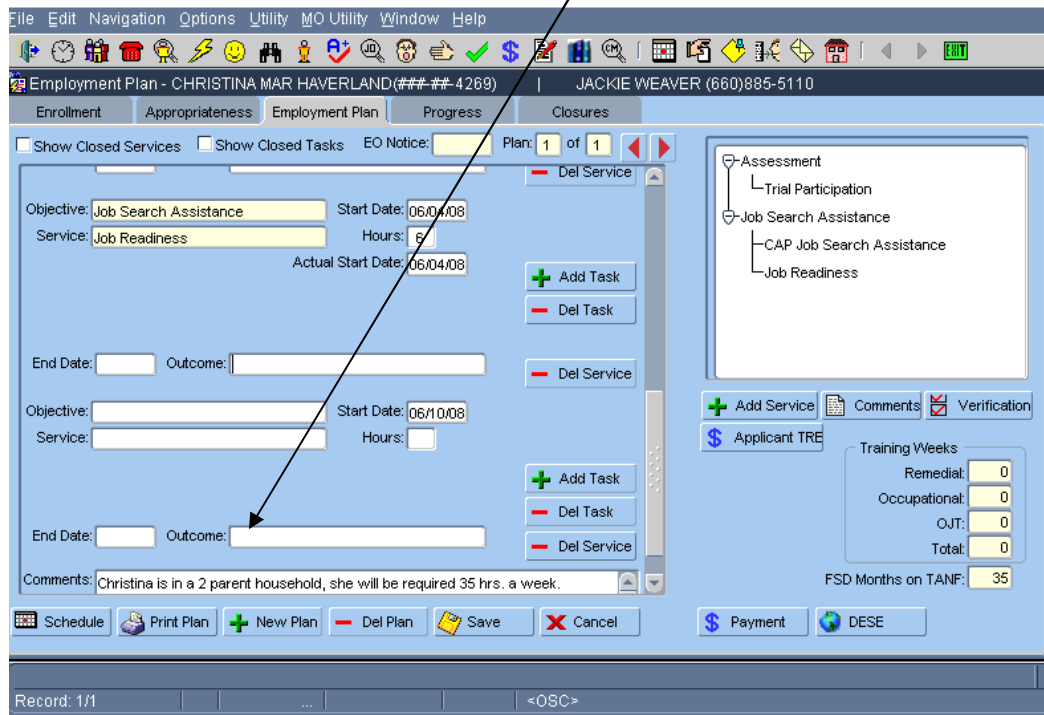
Question: *Updated 6/11/8*

How do we end a service if the customer is unable to come to the office since they don’t have any gas?

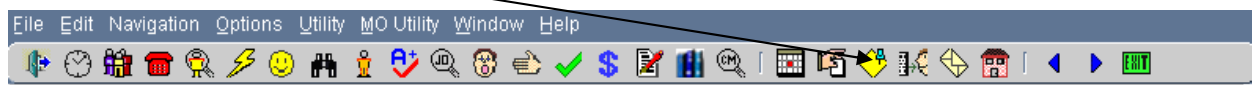
Answer:

The following can be completed:

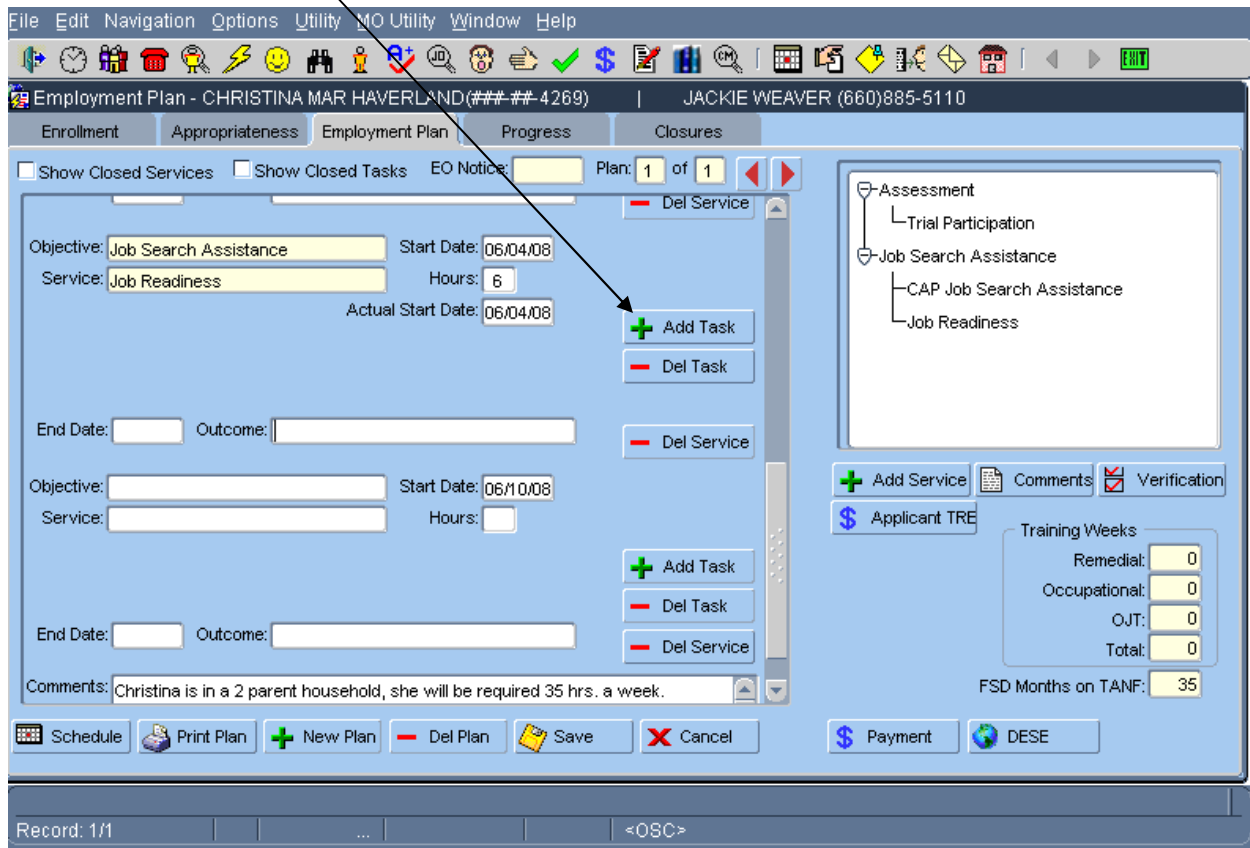
1. Enter 'Completed' on the 'Outcome'.



2. Enter a case note.



- Enter a task (from the Employment Plan) that the service was ended and you are awaiting the hard copy since customer currently has transportation barrier.



Question: *Added 6/25/8*

How does the ‘Trial Participation’ service differ from ‘Conciliation’?

Answer:

‘Trial Participation’ is the two week period the TA Recipient is complying to lift their sanction and ‘Conciliation’ is the period of time during which the case manager and the TA Recipient attempt to resolve or overcome barriers to the TA Recipient’s participation. (Separating these services will also allow future reports on sanctioned individuals who are participating.)

Question: *Added 6/17/8*

Why is the word “CAP” no longer in front of the Treatment and Support service?

Answer:

This service is actually for PFS and was incorrectly displayed with “CAP” in front of this service. All treatment and support services are now identified in the system as mental health, physical therapy, and substance abuse.

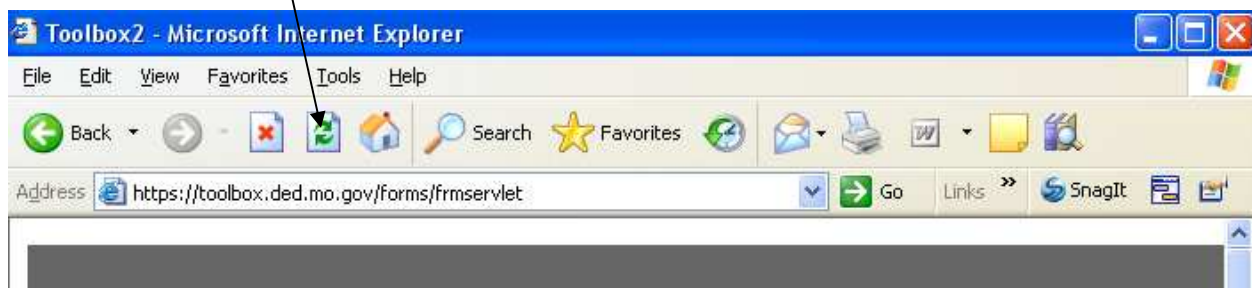
Session Timing Out

Question: *Added 6/17/8*

Is there a way to reenter Toolbox 2.0 after the session has timed out without going all the way out of the Internet?

Answer:

Select the ‘Refresh’ button’ which refreshes the java screen and you can log back in there.



Question: *Added 11/10/8*

What is the difference between the ‘Start Date’ and the ‘Actual Start Date’ on the Employment Plan?

Answer:

The start date is a “place holder”. The activity and start date can be entered once it is determined the client *will be* participating, working, going to school, etc.. The actual start date is the date the client actually started the activity. The start date and actual start date will either be the same date, or the actual start date will be later than the start date. The actual start date can be backdated seven days from the current date. (Please note, only actual hours entered on the Verification tab count toward federal participation.)

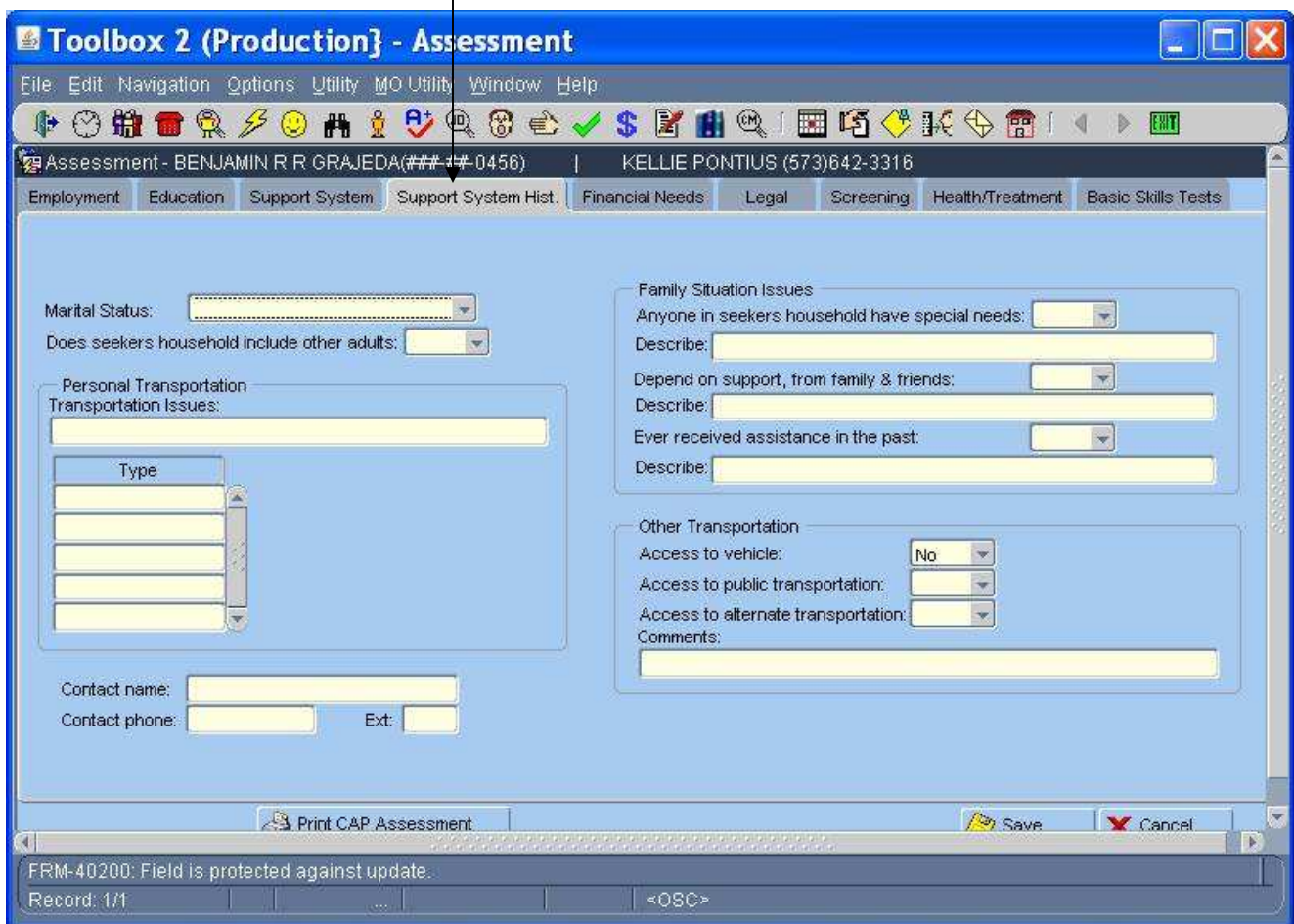
Example

- The customer calls and says he/she starts a job tomorrow on 10/28, so the case manager enters a start date of today 10/27, so it can be recorded.
- The customer actually starts the job on 11/1 and this has been verified, but the case manager is out of the office until 11/3
- On 11/3, the case manager enters the actual start date of 11/1.

Support System History

Question: *Added 7/30/8*

What is the 'Support System History' screen?



Toolbox 2 (Production) - Assessment

File Edit Navigation Options Utility MO Utility Window Help

Assessment - BENJAMIN R R GRAJEDA(###-##-0456) | KELLIE PONTIUS (573)642-3316

Employment Education Support System Support System Hist. Financial Needs Legal Screening Health/Treatment Basic Skills Tests

Marital Status:
Does seekers household include other adults:

Personal Transportation
Transportation Issues:

Type

Family Situation Issues
Anyone in seekers household have special needs:
Describe:
Depend on support, from family & friends:
Describe:
Ever received assistance in the past:
Describe:

Other Transportation
Access to vehicle: No
Access to public transportation:
Access to alternate transportation:
Comments:

Contact name:
Contact phone: Ext:

Print CAP Assessment Save Cancel

FRM-40200: Field is protected against update.
Record: 1/1 <OSC>

Answer:

It is a display screen only and it is not used for CAP.

TA Months

Question: *Added 7/30/8*

Where can the total TANF months be found in Toolbox 2.0?

Answer:

Click on the 'Employment Plan' screen and 'Employment Plan' tab and this will display the 'FSD Months on TANF'.



Tasks

Question: *Added 6/3/8*

Why am I getting a task regarding closing a case and why does the case have to be inactivated when the recipient has been closed for CAP for awhile?

Answer:

This is a feature that is sent to the primary counselor on the case. Tech Support is aware of this and has it on their agenda to discuss.

Question: *Added 7/30/8*

Will a case remain active past 90-days if there is a pending task?

Answer:

No. It will close at the end of 90 days.

Question: *Added 9/23/8*

Will I receive a task when a reengagement letter is sent?

Answer:

No. Toolbox 2.0 will not automatically send out tasks when reengagement letters are sent. This functionality was not implemented since some case managers have large case loads of sanctioned individuals and he/she may not be able to or want to receive that amount of tasks. In addition, some sanctioned records are not enrolled and therefore are not assigned to case managers. If you would like to track the sanctioned individuals, you can add a task when the reengagement letter is sent if you would like to track those individuals. Another way to search is through the call-in list.

Teen Parents

Question: *Added 11/10/8*

Will the teen parent indicator show for TA applicants?

Answer:

No. The indicator will not come over until the TA applicant has become a TA recipient, if applicable.

Transferring Records

Question: *Added 11/10/8*

How do we transfer clients to CAP locations since these are not available to transfer to?

Answer:

This Toolbox 2.0 functionality has been completed and cases can be transferred to CAP locations. The CAP locations are displayed in the drop-down list for the 'Case Transfer Functionality'. If a location in your region is not showing or you need to know what location to transfer a record to, please e-mail Central Office CAP staff to resolve.

Question: *Added 11/10/8*

I transferred the client to another location and they haven't assigned them, what should I do?

Answer:

Let the other region know the client has been transferred. However, until the client comes in, he/she cannot be transferred to a case manager and will stay on the transfer listing. CAP is working with ITSD to try to set up a "Dummy Counselor" until the client comes in.

Transferring Records

Question: *Updated 11/10/8*

Can we reassign a TA recipient to another region if he or she wants to be served there?

Answer:

Yes. The customer needs to complete the "Customer Choice" form. Then you can transfer the client using the "Transfer Clerk" feature. After the transfer is complete, notify the TA recipient and delete the task. The record needs to be checked periodically until the "new" region assigns a primary case manager at which time the previous primary case manager will be removed.

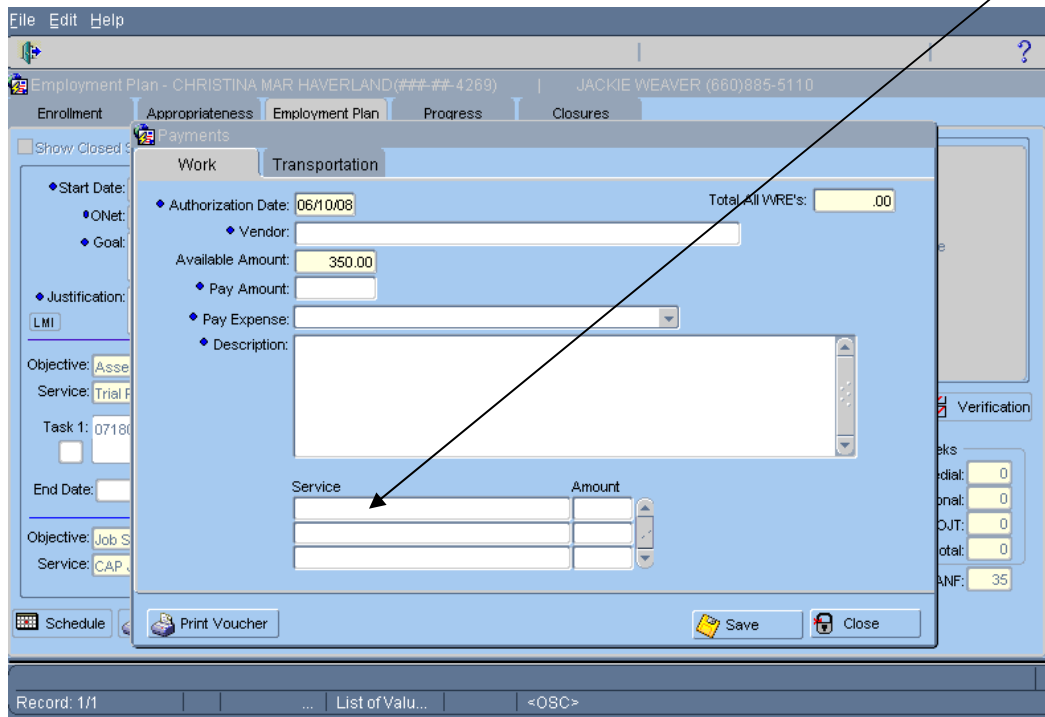
TRE/WRE

Question: *Updated 6/11/8*

If a client is in two different core activities to fulfill their required hours, does it matter which service their TRE is paid against?

Answer:

The TRE/WRE Payment Screen will allow amounts to be split for the ‘Service’. Therefore, the payment should be entered for the appropriate ‘Service’.



The screenshot shows a software interface for entering payment information. The main form has fields for Start Date, OnNet, Goal, Justification, LMI, Objective, Service, Task 1, End Date, Authorization Date (06/10/08), Vendor, Available Amount (350.00), Pay Amount, Pay Expense, and Description. A table at the bottom is used for splitting payments by service:

Service	Amount

Other visible elements include a 'Total All WRE's' field set to .00, a 'Verification' section on the right, and buttons for 'Schedule', 'Print Voucher', 'Save', and 'Close' at the bottom.

Question: *Added 6/3/8*

Why can't I enter TRE for a case that the system prompts is "inactive"?

Answer:

"Inactive" in this situation is referring to case management, it is not referring to if the case is "active" with FSD. If the case manager is working with the client, the case needs to be active and then TRE can be paid.

Question: *Added 6/3/8*

Can I delete a WRE payment?

Answer:

If you have access to delete WRE, there will be a button on the 'Payment Tab' under the 'Seeker History Screen'. If you need a payment deleted and you don't have this access, email Central Office CAP staff and we will delete the payment.

Question: *Added 6/25/8*

Why can't we pay TRE when we have a 'Start Date' entered on the 'Employment Plan' screen?

Answer:

The 'Actual Start Date' must also be entered.

Question: *Added 7/30/8*

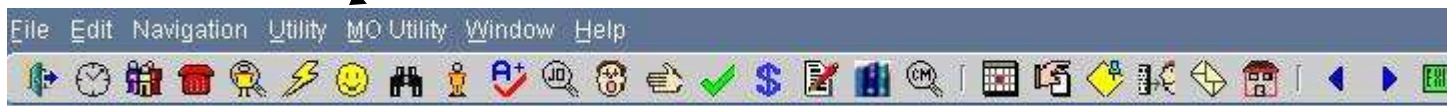
Is there a way to review TRE/WRE payments?

Answer:

Yes. A new feature has been added to Toolbox 2.0 which allows users with access to review TRE and/or WRE authorized by a specific counselor. Users who have the ability to reconcile WRE will have the ability to perform this query.

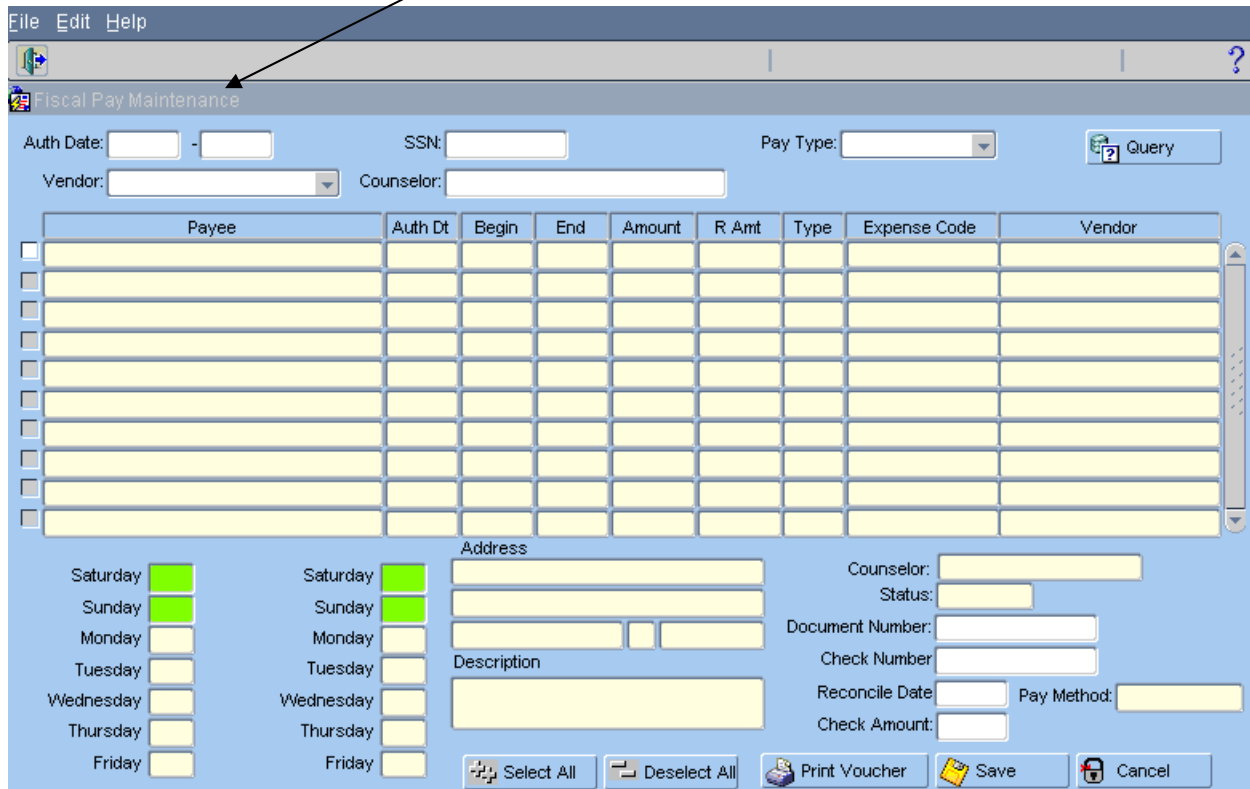
At this time, there is no ability to print the data as a report.
To access this feature:

- Select 'MO Utility' from the menu bar.



- Select 'Fiscal Payment Query' from the drop-down list.

- The 'Fiscal Pay Maintenance' screen will come up.



- Hit 'F2' to select the counselor. This will display an active list of counselors for the region/location. In addition, the search can be refined by selecting a date range, vendor name (for WRE only), SSN of the TA recipient, and pay type of TRE, WRE, or both.

Question: *Updated 7/30/8*

How is WRE reconciled?

Answer:

WRE is reconciled by:

- Locating the client on the fiscal payment screen
- Highlighting the voucher
- Enter in the check number, date of reconciliation and new amount.

Please note, this cannot be completed from the ‘Seeker History’ screen and ‘Payment’ since there is no ‘Save’ button on this screen.

Question: *Added 9/23/8*

Do I need a certain type of access to delete pending TRE/WRE payments?

Answer?

No. Any CAP staff should be able to delete TRE/WRE while in pending status.

Question: *Added 9/23/8*

Why is WRE calculating off of the authorized instead of reconciled amount?

Answer?

This error has been corrected. Please let Central Office CAP staff know if this error occurs again.

Question: *Added 11/10/8*

What should be done if an incorrect amount of TRE was entered?

Answer:

If the payment is in “pending” status, the payment can be deleted and the correct amount reentered. If the payment has already been “sent”, and needs to be increased, a change request needs to be submitted. If the payment was sent and needs to be decreased, local “recouping” procedures need to be followed.

Updating Addresses

Question: *Updated 6/11/8*

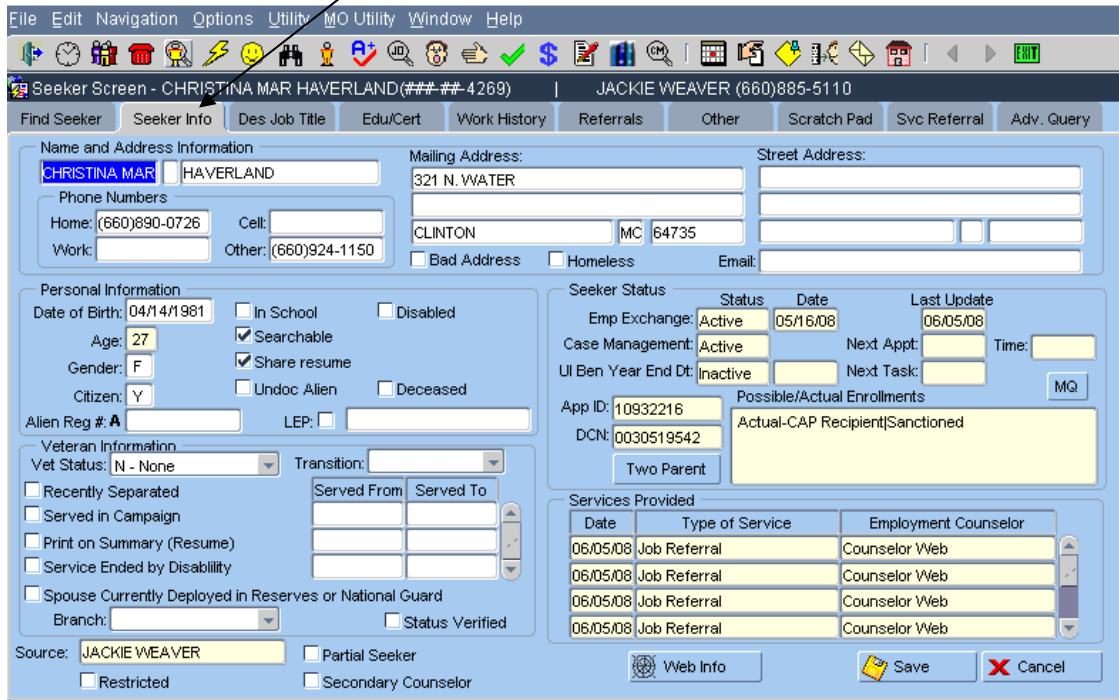
Why is this record still showing in another county?

Answer:

In this case, the address hasn’t been updated.

To update the address:

1. Change it on the 'Seeker Info Tab'



File Edit Navigation Options Utility MO Utility Window Help

Seeker Screen - CHRISTINA MAR HAVERLAND(### ## 4269) | JACKIE WEAVER (660)885-5110

Find Seeker | **Seeker Info** | Des Job Title | Edu/Cert | Work History | Referrals | Other | Scratch Pad | Svc Referral | Adv. Query

Name and Address Information

CHRISTINA MAR HAVERLAND

Mailing Address: 321 N. WATER

Street Address:

CLINTON MC 64735

Phone Numbers

Home: (660)890-0726 Cell: Work: Other: (660)924-1150

☐ Bad Address ☐ Homeless Email:

Personal Information

Date of Birth: 04/14/1981 ☐ In School ☐ Disabled

Age: 27 ☒ Searchable

Gender: F ☒ Share resume

Citizen: Y ☐ Undoc Alien ☐ Deceased

Alien Reg # A LEP:

Veteran Information

Vet Status: N - None Transition:

☐ Recently Separated ☐ Served in Campaign

☐ Print on Summary (Resume)

☐ Service Ended by Disability

☐ Spouse Currently Deployed in Reserves or National Guard

Branch: Status Verified

Source: JACKIE WEAVER ☐ Partial Seeker ☐ Restricted ☐ Secondary Counselor

Seeker Status

Status Date Last Update

Emp Exchange: Active 05/16/08 06/05/08

Case Management: Active Next Appt: Time:

UI Ben Year End Dt: Inactive Next Task: MQ

App ID: 10932216 Possible/Actual Enrollments

DCN: 0030519542 Actual-CAP Recipient[Sanctioned]

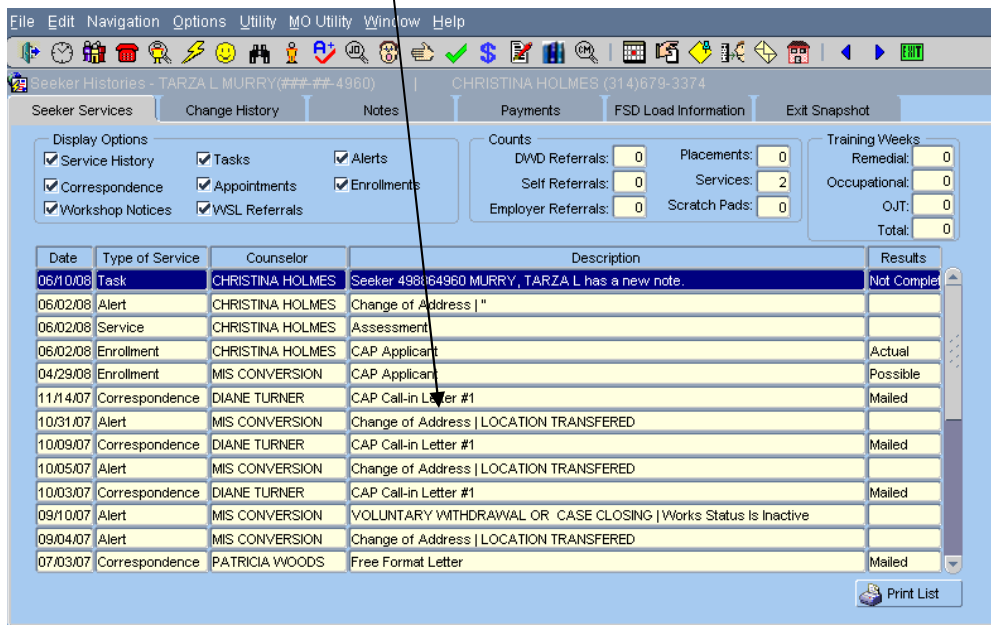
Two Parent

Services Provided

Date	Type of Service	Employment Counselor
06/05/08	Job Referral	Counselor Web
06/05/08	Job Referral	Counselor Web
06/05/08	Job Referral	Counselor Web
06/05/08	Job Referral	Counselor Web

Web Info Save Cancel

2. Verify the 'Change of Address' writes to the 'Seeker History'



File Edit Navigation Options Utility MO Utility Window Help

Seeker Histories - TARZA L MURRY(### ## 4960) | CHRISTINA HOLMES (314)679-3374

Seeker Services | **Change History** | Notes | Payments | FSD Load Information | Exit Snapshot

Display Options

☒ Service History ☒ Tasks ☒ Alerts

☒ Correspondence ☒ Appointments ☒ Enrollments

☒ Workshop Notices ☒ WSL Referrals

Counts

DVD Referrals: 0 Placements: 0

Self Referrals: 0 Services: 2

Employer Referrals: 0 Scratch Pads: 0

Training Weeks

Remedial: 0

Occupational: 0

OJT: 0

Total: 0

Date	Type of Service	Counselor	Description	Results
06/10/08	Task	CHRISTINA HOLMES	Seeker 498164960 MURRY, TARZA L has a new note.	Not Complete
06/02/08	Alert	CHRISTINA HOLMES	Change of Address "	
06/02/08	Service	CHRISTINA HOLMES	Assessment	
06/02/08	Enrollment	CHRISTINA HOLMES	CAP Applicant	Actual
04/29/08	Enrollment	MIS CONVERSION	CAP Applicant	Possible
11/14/07	Correspondence	DIANE TURNER	CAP Call-in Letter #1	Mailed
10/31/07	Alert	MIS CONVERSION	Change of Address LOCATION TRANSFERRED	
10/09/07	Correspondence	DIANE TURNER	CAP Call-in Letter #1	Mailed
10/05/07	Alert	MIS CONVERSION	Change of Address LOCATION TRANSFERRED	
10/03/07	Correspondence	DIANE TURNER	CAP Call-in Letter #1	Mailed
09/10/07	Alert	MIS CONVERSION	VOLUNTARY WITHDRAWAL OR CASE CLOSING Works Status Is Inactive	
09/04/07	Alert	MIS CONVERSION	Change of Address LOCATION TRANSFERRED	
07/03/07	Correspondence	PATRICIA WOODS	Free Format Letter	Mailed

Print List

3. Verify FSD has received the alert
4. If it is still showing the old address, it is because FSD has not sent an updated address.

Verification Tab

Question: *Added 11/10/8*

How do I enter partial hours per day since Toolbox 2.0 will only allow whole hours?

For example, client completed the following in a job search:

- 2 ½ hours on 10/8,
- 10 ½ hours on 10/9,
- 3 hours on 10/10,
- 2 hours on 10/13, and
- 2 hours on 10/14.

Answer:

If there is an hour or a few hours in minutes for the week, just appropriate those hour(s) to whichever hours that had the highest minuets. Regardless, the hours entered should equal the weekly rounded amount.

In the above example:

- 2 ½ hours, 10 ½ hours, 3 hours, 2 hours, 2 hours = 20 hours
- This could be entered as 3, 10, 3, 2, and 2

Another example:

- 2 hours 20 mins, 5 hours 10 mins, 6 hours 35 mins, 7 hours 8 mins = 21 hours 13 mins or 21 hours rounded
- This could be entered as 2, 5, 7, 7

Question: *Added 11/10/8*

Why can't I enter the hours for a particular service on the 'Verification' tab?

Answer:

If the 'Actual Start Date' is not entered, the service will not appear on the 'Verification' tab. If the service was ended and no actual start date was entered, the hours cannot be entered. ITSD will generate a report so Central Office CAP staff can work with field staff to correct services that were ended with no actual start date.


Work History

Question: *Added 11/10/8*

How do I complete the Work History in Toolbox 2.0?

Answer:

You can complete the work history by:

- Clicking on the Assessment icon  on the menu bar;
- Clicking on the green check mark under 'Job Description';
- Typing in the appropriate fields to send either the unverified/verified work history; and
- Clicking close.

The 'Seeker History' should be checked to confirm the alert has been generated.

In the near future:

- The employer's phone number will be added as a field in the Work History box; and
- The salary amount will be sent to FAMIS with the work history alert.